

EssentialPIM Pro Help

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1 Introducing Essential PIM Pro

Welcome to EssentialPIM Pro!

EssentialPIM Pro is the advanced version of Personal Information Manager. Handles all your scheduling, contacts, to do lists, notes, password entries and email messages with easy-to-use, intuitive tools.

Pro version significantly distinguishes from EssentialPIM Free, taking functionality on a completely another level. Some of most remarkable features in EssentialPIM Pro are:

- Multi-users access to database
- Storing and/or linking attachments
- Assigned people for To Dos
- Advanced Backup
- Editable categories for appointments or to dos
- Hierarchical To Do lists
- Contact Groups
- Color Printing
- Sending any item to email
- Synchronization with online services including, but not limited to Google, Yahoo. SyncML and CALDav servers
- Outlook synchronization
- Custom views
- Mass mail

...and many other features.

2 Features

EssentialPIM Pro is a full-featured personal information manager, which offers:

- Excellent usability. Shortcuts that are fun to use and boost your productivity. Easy, intuitive tools arranged right where you need them
- Security. All data can be password-protected and the database file is encrypted with multiple encryption algorithms, with the advanced industry standard AES (Rijndael), 256-bit key, and Blowfish 448-bit key
- Versatile synchronization and import/export capabilities. You can import and export HTML, RTF, CSV, TXT, vCard and iCal. You can perform complete synchronization with Microsoft Outlook, all Google services, Android, iOS, WinMobile, Palm, Yahoo, Memotoo, GooSync, OneMediaHub, AOLSsync, Toodledo, Stylite/Egroupware, HighRiseHQ, CalDAV, SyncML
- Available in many languages: Bulgarian, Chinese, Czech, English, French, German, Hellenic, Hungarian, Indonesian, Italian, Japanese, Norwegian, Polish, Portuguese, Russian, Slovak, Spanish, etc.
- System tray icon with a hotkey for starting and configuring the software
- Open-source Firebird database. Advanced users and system administrators get great flexibility in managing databases

3 License

EssentialPIM Pro(tm) License Agreement.

EssentialPIM Pro is SHAREWARE.

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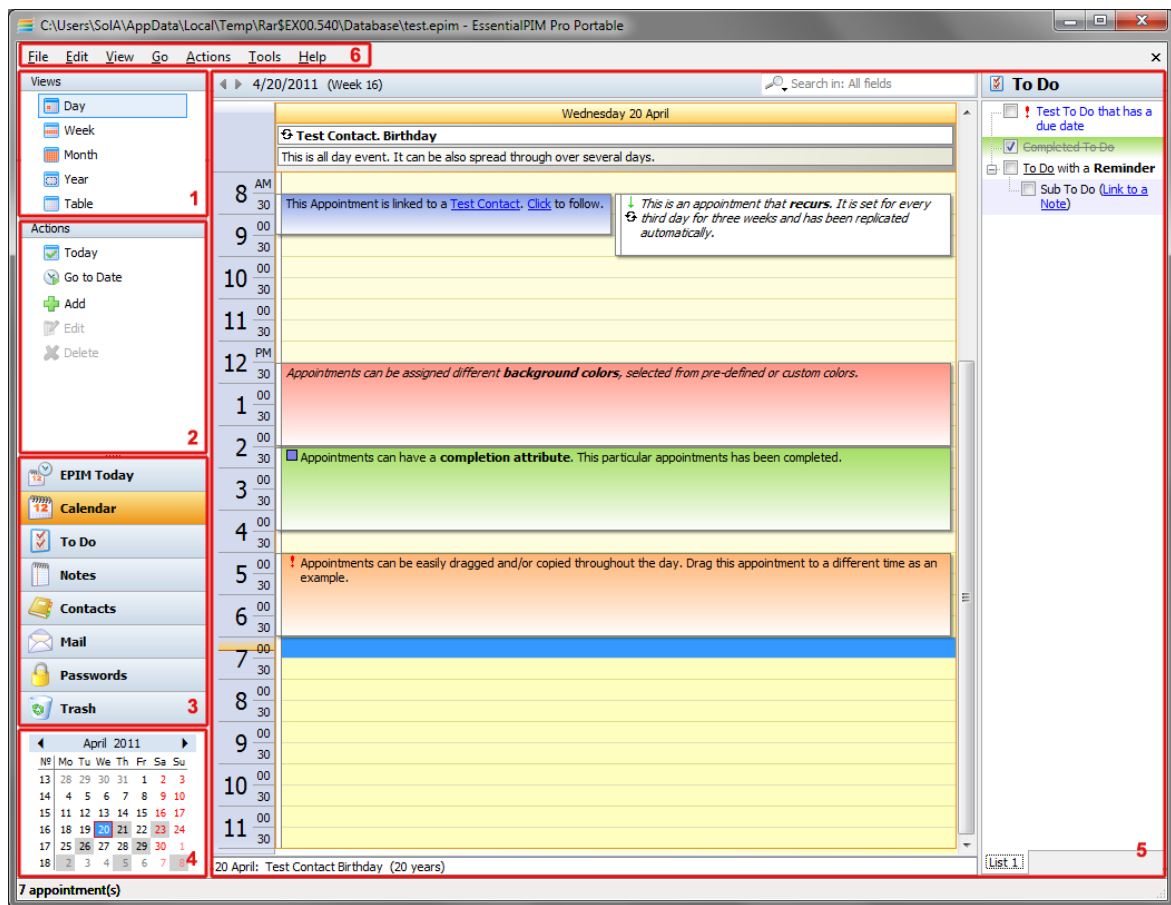
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4 Working with EssentialPIM Pro

EssentialPIM Pro implements a number of features. Most of them are intuitive, which allowed to make simple interface. The following topics describe steps you need to take in order to work effectively with the program and also make it easier to organize and synchronize your data.

- Calendar - day planning the versatile way
- To Do lists - quick and simple list of things to do
- Notes - any data can be stored in tree-structured notes
- Contacts - all contacts organized
- Passwords - powerful password managing tool
- Mail - built in e-mail client

Below is the main EssentialPIM Pro window:



Section 1: View bar changes main window views. This bar is available for Calendar and To Do modules.

Section 2: Action bar is the easiest way to add, edit or delete an appointment, note or contact. The contents of this window changes, depending on the module (Calendar, Notes or Contacts) opened.

Section 3: This section is used for module selection - Calendar, To Do, Notes or Contacts.

Section 4: It is the calendar. It can be used to have overview over your calendar and for easy navigation.

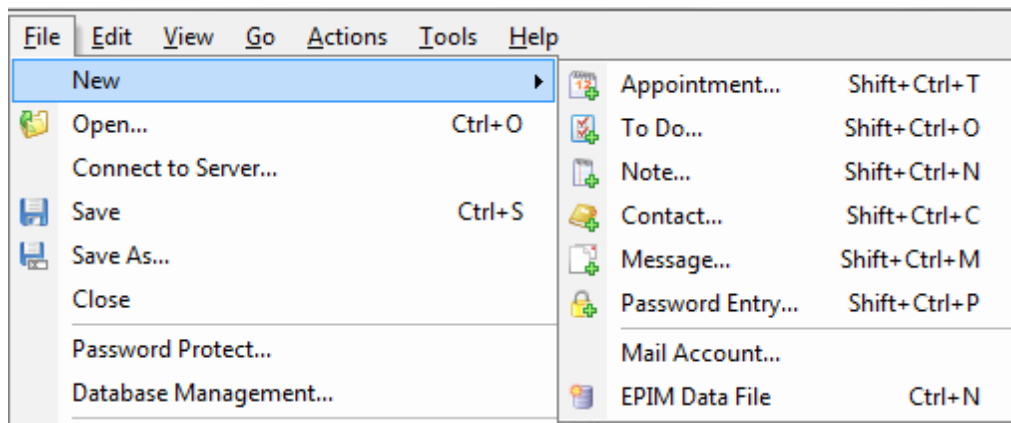
Section 5: The main window of the module, its properties and view change, depends on currently opened module.

Section 6: Main menu.

4.1 First run

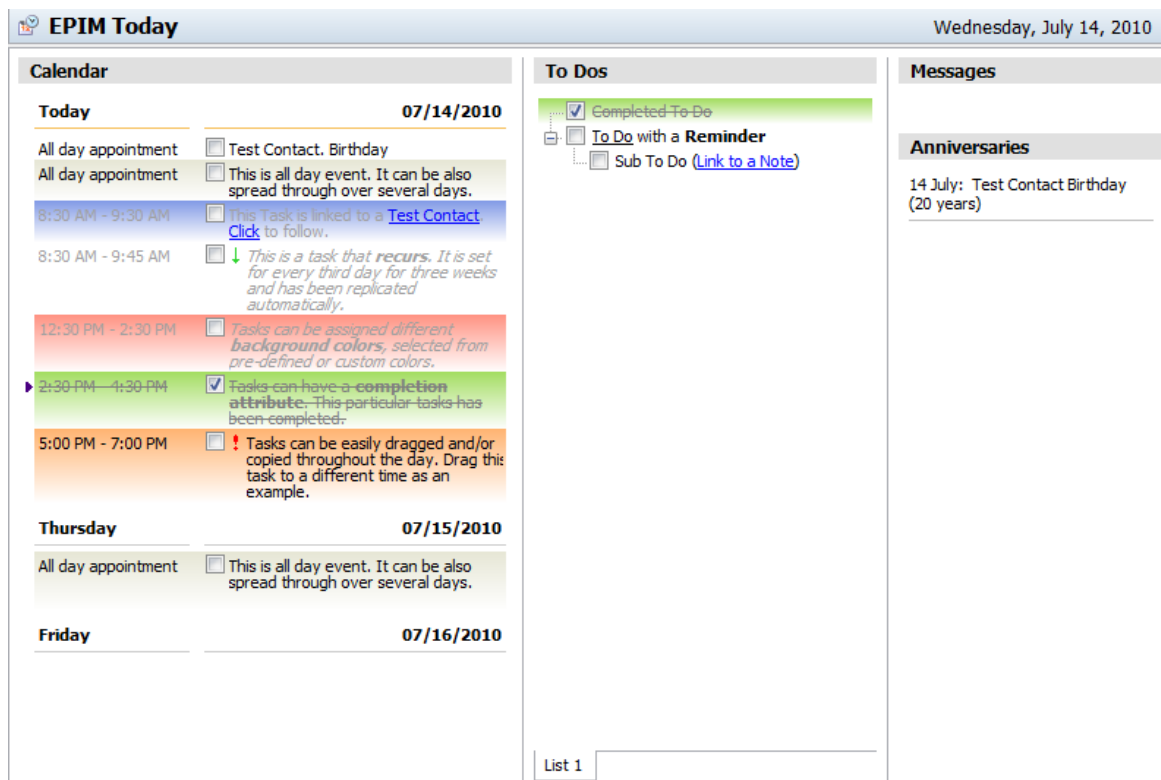
When you run EssentialPIM Pro for the first time it creates test.epim database file, which contains sample items for better understanding of how the program works. Feel free to create a new database file by choosing **File -> New -> EPIM Data File**, or you can continue working with the created test database.

Creating new database:



4.2 EPIM Today

EPIM Today shows an overview of Appointments, Anniversaries and To Dos for nearest days. You can configure EPIM Today settings in **Tools -> Options -> EPIM Today**.



Calendar section shows Appointments for today and 3 upcoming days (by default settings).

To Dos section shows list of upcoming To Dos.

Messages section shows mail folders with unread messages.

Anniversaries section only appears when there's an anniversary coming soon. Anniversaries are being taken from contacts.

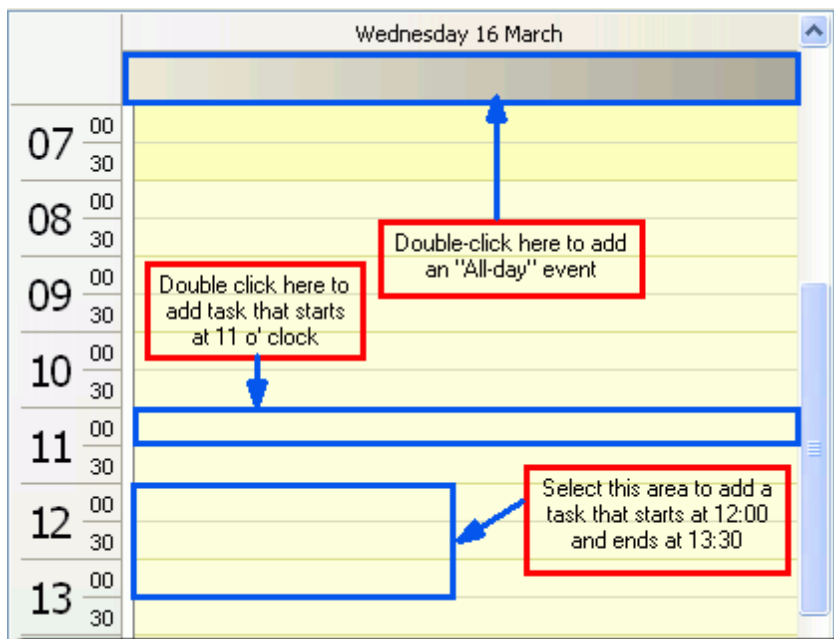
All the sections in EPIM Today can either be turned on or off in EPIM Today options.

Note! If some appointments or to dos are not being shown, make sure their categories aren't excluded from **View -> Show Categories** menu in the corresponding modules.

4.3 Calendar

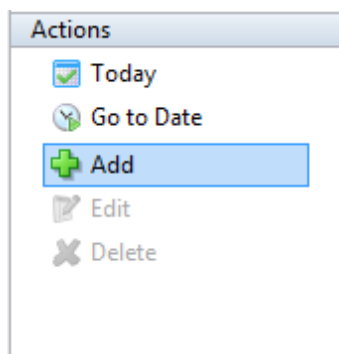
4.3.1 Adding an appointment

The screenshot below explains how to easily add a certain appointment:



(Using mouse, highlight the time needed for the appointment and release the button: the new appointment pop-up windows appears. Just enter the text and, if needed, assign Priority, Category, Completion, Alarms and Re-occurrence, then press OK)

Another way:



Press **Add** button. In the opened dialog:

1. select start time
2. enter text
3. assign needed parameters

To enter a non-timed entry for the day: the process is the same, except you need to check the **All day event** box.

Exclusive appointment - enabling this option for the appointment will ensure that this appointments time will not be taken by any other task. If you will try later to add an appointment with time coinciding with "Exclusive appointment" - EssentialPIM Pro will not let you do it.

All day event - that is the appointment that does not have a certain time, rather, it is assigned to the whole day and will appear on top of each day

4.3.2 Editing an appointment

Appointments could be edited any time by double-click on it. It will open **Appointment Info** dialog.

Subject - Name of the appointment which will be listed in Calendar views.

Location - set a location for the appointment. All entries will be saved in dropdown menu.

Status - this option affects Network version only. Refer to Item Statuses topic for more details.

Start time - set start time of the appointment.

End time - set end time of the appointment.

Duration - automatically sets needed appointment end time.

All day event - that is the appointment that does not have a certain time, rather, it is assigned to the whole day and will appear on top of each day.

Exclusive appointment - enabling this option for the task will ensure that this appointments time will not be taken by any other task. If you will try later to add an appointment with time coinciding with "Exclusive appointment" - EssentialPIM Pro will not let you do it.

Priority - set a priority for the appointment.

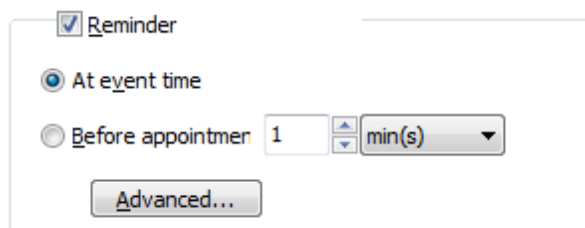
Completion - set a rate of completion of the appointment.

Category - set a category for the appointment. You can create custom categories by pressing "..." button. For more detail refer to Custom categories topic.

Toolbar at the top allows text formatting in **Subject** and **Notes** fields.

Reminder section

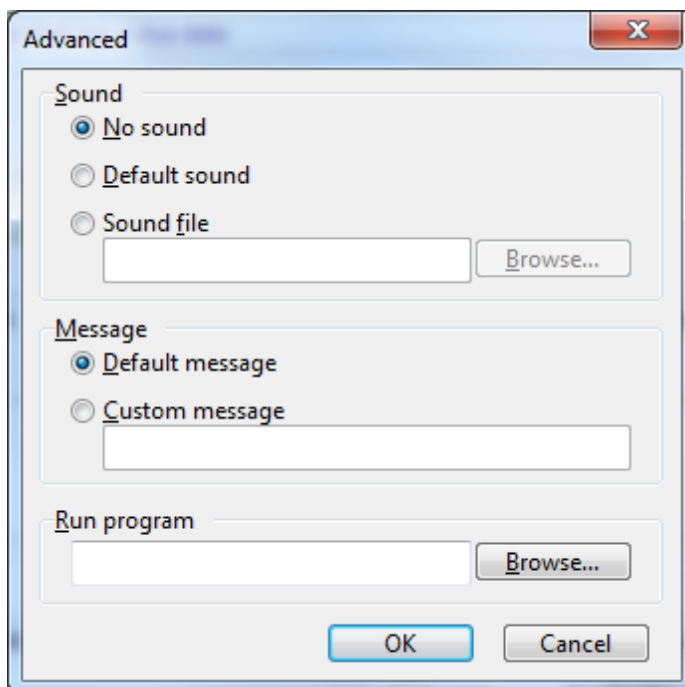
Reminder could be enabled by clicking on the **Reminder** check box:



The screenshot shows a section titled "Reminder" with a checked checkbox. Below it are two radio button options: "At event time" (selected) and "Before appointment". The "Before appointment" option is followed by a text input field containing the number "1" and a dropdown menu showing "min(s)". At the bottom of the section is an "Advanced..." button.

Reminder could be set **At event** time or **Before appointment**.

It is possible to set some additional reminder options by pressing **Advanced** button:



The screenshot shows a dialog box titled "Advanced" with a close button (X) in the top right corner. It contains three sections: "Sound" with radio buttons for "No sound" (selected), "Default sound", and "Sound file" (with a text input field and a "Browse..." button); "Message" with radio buttons for "Default message" (selected) and "Custom message" (with a text input field); and "Run program" with a text input field and a "Browse..." button. At the bottom are "OK" and "Cancel" buttons.

In this dialog you can assign **Default sound** or any custom **Sound file** (*.wav or *.mp3) for alert.

In the **Message** section you can set a **Custom message** for appointment reminder. You can also assign a program that will run with reminder. You can locate assigned program via Browse button or by entering path to application manually.

Repeat Appointment section

It is possible to make the appointment repeatable by checking **Repeat Appointment** check box:

A screenshot of a dialog box section titled "Repeat appointment". It contains a checked checkbox labeled "Repeat appointment". Below it, there is a "Repeat every:" label followed by a text box containing "1" and a dropdown menu showing "day(s)". Below that is another checked checkbox labeled "Expires" followed by a date dropdown showing "8/14/2010". At the bottom is a button labeled "Advanced...".

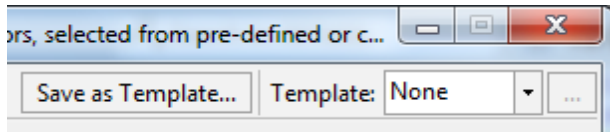
You can set daily, weekly or monthly recurrence of current appointment. By default there will be created 10 recurrence of current task. You can set expire date if you need more. For more complex recurrence adjusting press **Advanced** button:

A screenshot of the "Appointment Repeat" dialog box. It has a title bar with a close button. The dialog is divided into two main sections. The top section, "Repeat pattern", has radio buttons for "Daily", "Weekly" (selected), "Monthly", and "Yearly". To the right of these is a "Recur every" section with a text box containing "1" and the text "week(s) on". Below this are checkboxes for days of the week: Monday, Tuesday, Wednesday (checked), Thursday, Friday, Saturday, and Sunday. The bottom section, "Range of recurrence", has a "Start date:" label followed by a date dropdown showing "7/14/2010". To the right are three radio button options: "No end date", "End after:" (with a text box containing "3" and the text "occurrences"), and "End by:" (with a date dropdown showing "8/ 3/2010"). At the bottom right are "OK" and "Cancel" buttons.

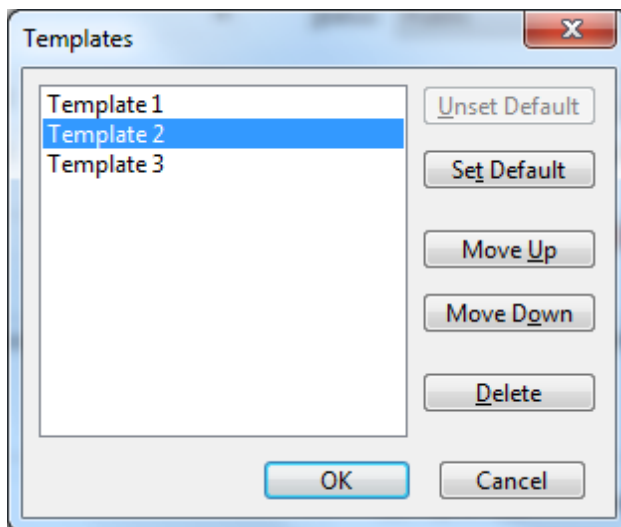
This dialog allows to adjust recurrence more specifically. I.e. you can set to repeat appointment every second Tuesday in the month or every third day etc.

Templates

Any appointment can be saved as a template and then easily applied any time later.



Once an appointment is saved as a template, it becomes available from the nearby **Template** drop-down box. To manage templates, click on the button with three dots at the top-right corner of **Appointment Info** dialog. You will be able to move templates up or down the list and set any of the templates as being a default one for all newly created appointments.

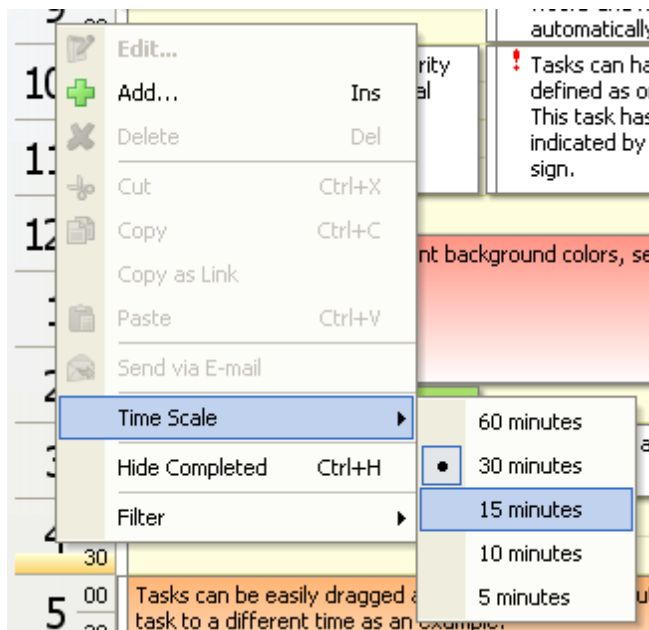


4.3.3 Appointment types

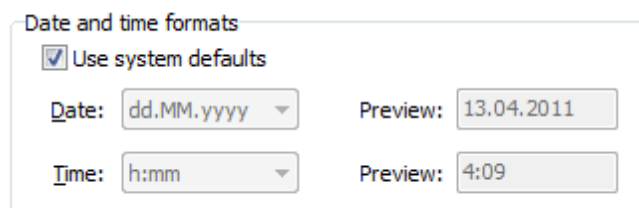
There are two types:

- Timed entries (appointments that have beginning and end times)
- Non-timed entries (all day appointments)

Days in Calendar could be set to variable time scales by clicking on **View -> Time Scale** or by right-clicking on the scale in Day and Week views:

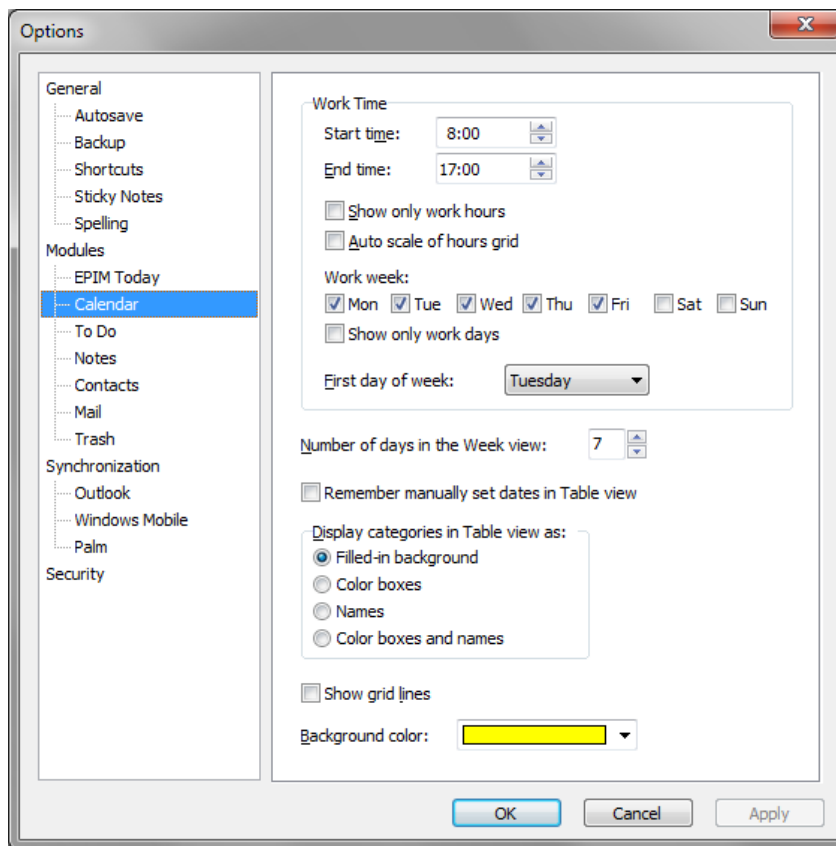


Hours in Calendar are being shown either in 12 or 24 hours formats. Date and time format could be set under **Tools -> Options -> General**.



Use system defaults option makes EPIM to take date and time format settings based on you current Windows regional settings. You can change that in **Start -> Settings -> Control Panel -> Regional and Language Options**.

Working days and hours could be set at **Tools -> Options -> Calendar**.



Work time is marked with lighter color in Calendar.

Show only work hours - this option allows to have only work hours shown in Day and Week views.

Auto scale of hours grid - fits calendar to EssentialPIM's window size.

First day of week - sets first day for the week. This option overrides Windows regional settings option.

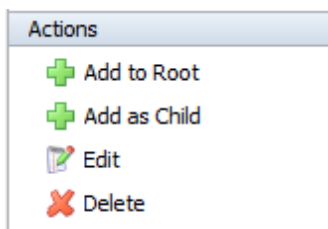
4.4 To Do

4.4.1 Adding a to do

Hierarchical To Do module in EssentialPIM Pro allows you to track projects' progress and make a system of complex relationships within projects.

Subject	Start time	Due date	Completion	Location	Assignee	Duration
Completed To Do			100%			
To Do with a Reminder						
Sub To Do						
Test To Do that has a due		4/16/2009				

To add a To Do press **Add** button in Action bar:



In opened dialog:

1. select start time
2. enter text
3. assign necessary parameters

It is also possible to add a To Do by double-click on mine window in To Do module or To Do section in Calendar.

4.4.2 Editing a to do

To Do's could be edited any time by double-click on it. It will open **To Do Info** dialog.

 A screenshot of the 'Test To Do that has a due date' dialog box. The dialog has a title bar with standard window controls. Below the title bar is a toolbar with icons for Bold, Italic, Underline, Strikethrough, Text Color, and Background Color, along with a 'Save as Template...' button and a 'Template: None' dropdown. The main area is divided into several sections: 'To Do' with a 'Subject' field containing 'Test To Do that has a due date'; 'Location' and 'Status' dropdowns; 'Start time' and 'Due date' fields with date and time pickers; a 'Show in Calendar' checkbox; 'Priority' (High), 'Completion' (No data), and 'Category' (None) dropdowns; a 'Notes' text area; 'Reminder' and 'Repeat To Do' sections with various settings and 'Advanced...' buttons; and 'OK' and 'Cancel' buttons at the bottom.

Subject - Name of the to do which will be listed in Today view.

Location - set a location for the to do. All entries will be saved in drop-down list.

Status - this option affects Network version only. Refer to Item Statuses topic for

more details.

Start time - set start time of the to do.

End time - set end time of the to do.

Show in Calendar - puts a related item to Calendar. All changes made in calendar item will be reflected in original To Do and otherwise changes in To Do will update calendar item.

Priority - set a priority for the task.

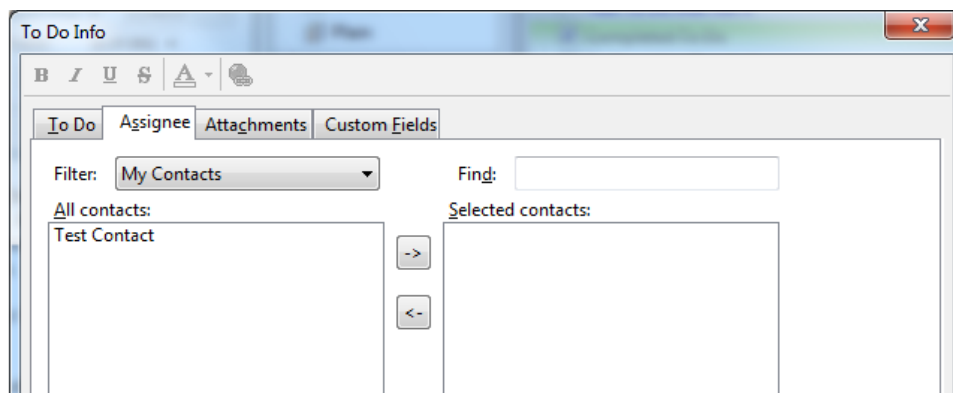
Completion - set a rate of completion of the task.

Category - set a category for the task. You can create custom categories by pressing "...". For more detail refer to Custom categories topic.

Toolbar at the top allows text formatting in **Subject** and **Notes** fields.

Assignee

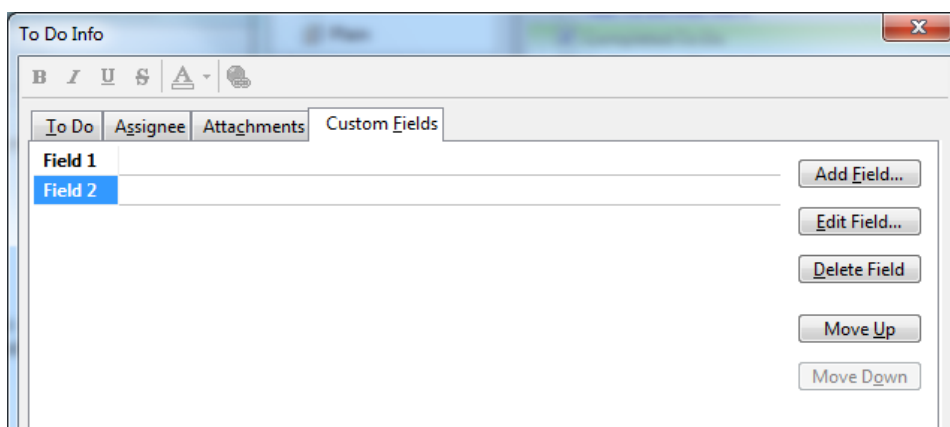
Assignee tab allows to assign contacts from the Contacts module to a to do.



Left pane shows the list of available contacts, the right one shows contacts already assigned to a to do item. Contacts could be moved using arrow buttons or by double-clicking selected contacts. **Filter** drop-down list reflects groups structure in Contacts module which makes easier to locate necessary contacts.

Custom Fields

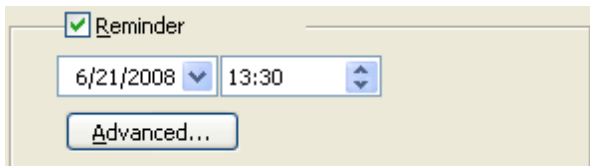
This tab allows to add user defined fields.



Buttons on the right allow to add new fields, edit existing or delete unnecessary fields. Move up and down buttons serve to adjust fields order in the list.

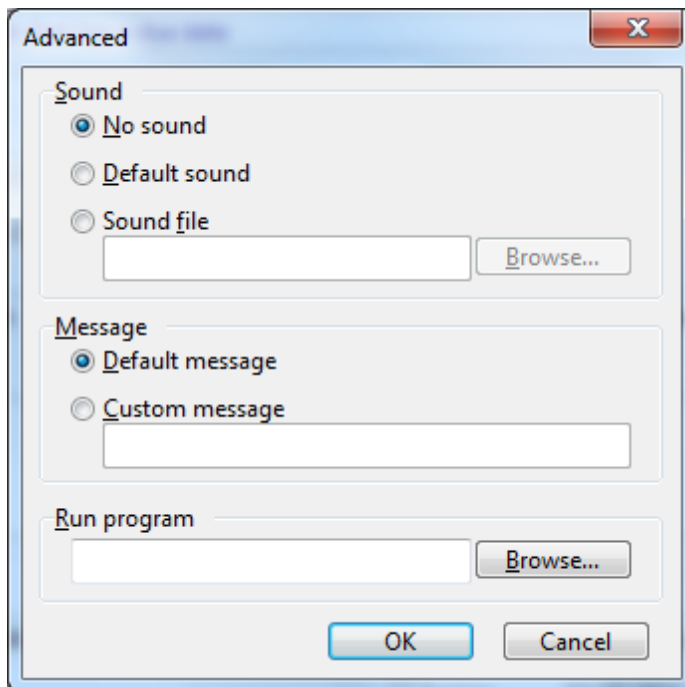
Reminder section

Reminder could be enabled by checking **Reminder** check box:



Reminder could be set at the current date and time.

It is possible to set some additional reminder options by pressing **Advanced** button:



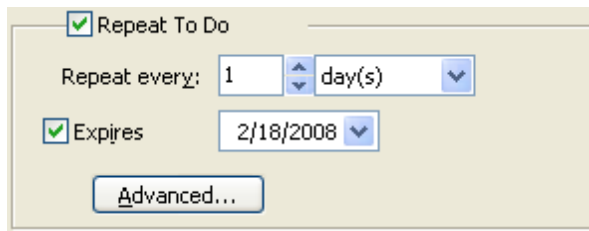
In this dialog you can assign **Default sound** or any custom **Sound file** (*.wav or *.mp3) for alert.

In the **Message** section you can set a **Custom message** for to do reminder.

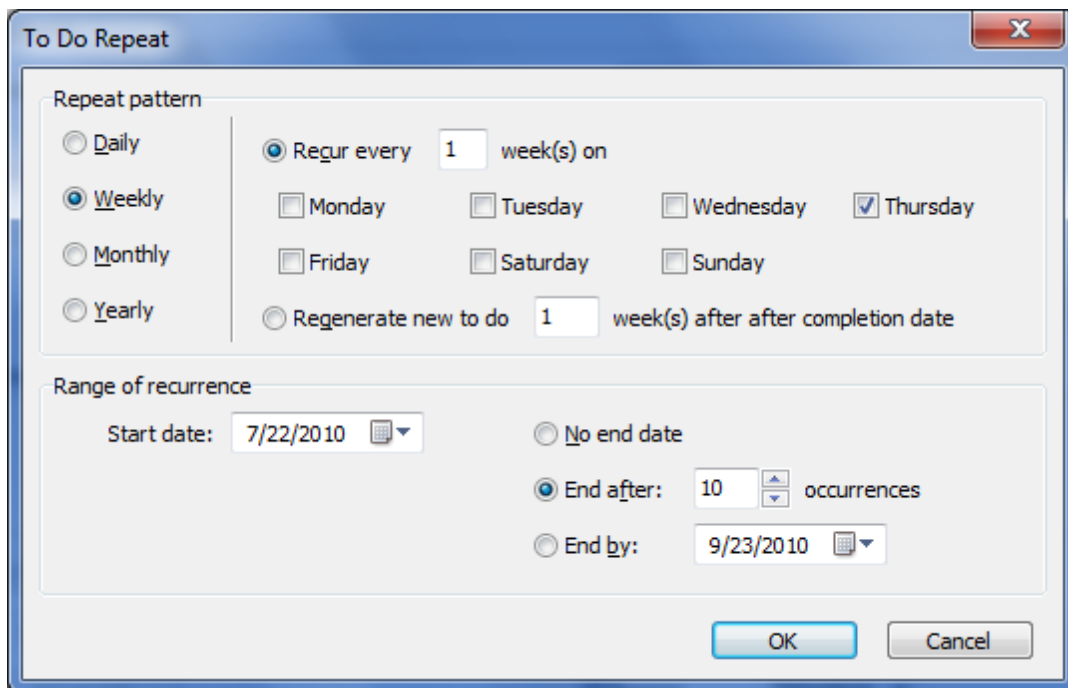
You can also assign a program that will run with reminder. You can locate assigned program via Browse button or by entering path to application manually.

Repeat To Do section

It is possible to make a To Do repeatable by checking **Repeat To Do** check box:



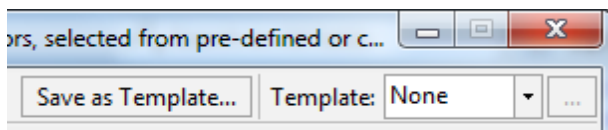
You can set daily, weekly or monthly recurrence of current To Do. By default there will be created 10 recurrence of current To Do. You can set expire date if you need more. For more complex recurrence adjusting press **Advanced** button:



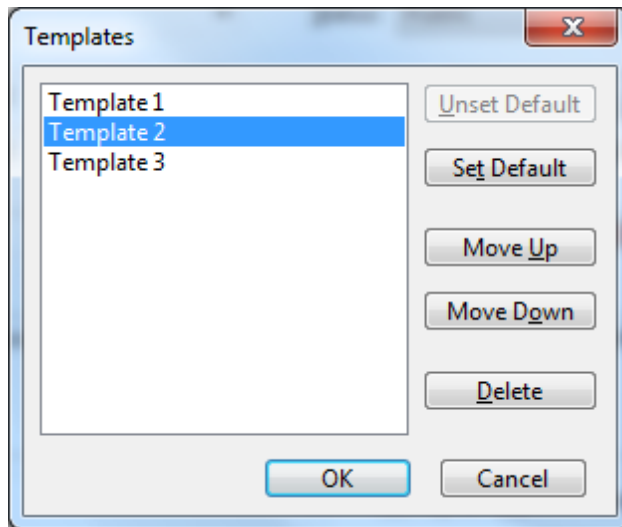
This dialog allows to adjust recurrence more specifically. I.e. you can set to repeat to do every second Tuesday in the month or every third day etc.

Templates

Any To Do can be saved as a template and then easily applied any time later.



Once a To Do is saved as a template, it becomes available from the nearby **Template** drop-down box. To manage templates, click on the button with three dots at the top-right corner of **To Do Info** dialog. You will be able to move templates up or down the list and set any of the templates as being a default one for all newly created To Dos.



4.4.3 To dos managing

As it was told To Do module could use hierarchical structure. To create sub-To Do select parent To Do and press **Add as Child** button

You can use **Move In/Out** and **Move Up/Down** buttons to edit hierarchical structure. It's also possible to drag & drop To Do's to each other to edit hierarchy.

Collapse/Expand All buttons easily collapse/expand the whole tree structure:

The module has three main views: **Tree**, **Consolidated** and **Plain**. You can switch between them using buttons on the left pane:

- **Tree** view shows hierarchical structure of To Do's.
- **Consolidated** view shows To Do's from all lists in hierarchical structure
- **Plain** view ignores all the relationships between To Do's and shows them all as root entries.

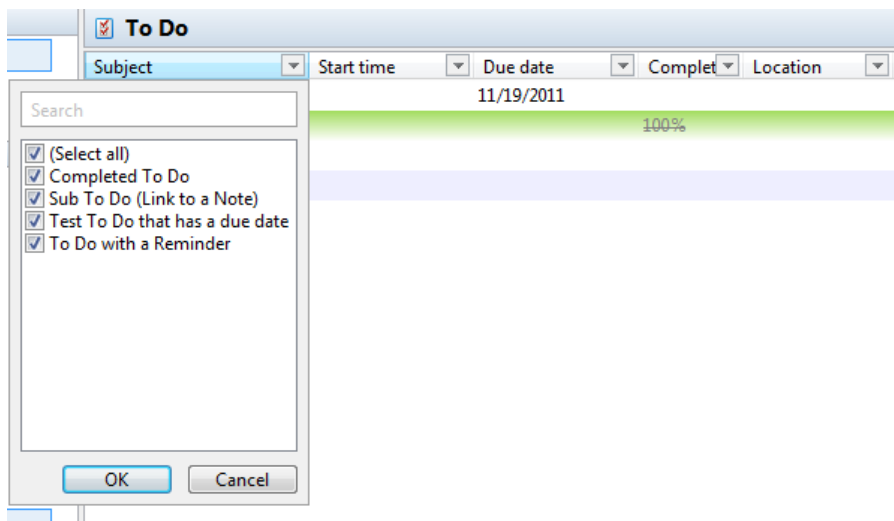
To Do items could be placed to calendar as a linked item with original To Do or as a separate appointment. Right-click a To Do and choose one of the following options:

- **Show in Calendar** adds an Appointment to Calendar related to current To Do.
- **Save as Appointment** option from To Do context menu is similar to **Show in Calendar** option but creates independent event.

Hide Completed option in context menu works on all completed entries. Completed root entry, will not, however, be hided, unless all sub-entries are completed.

Filtering

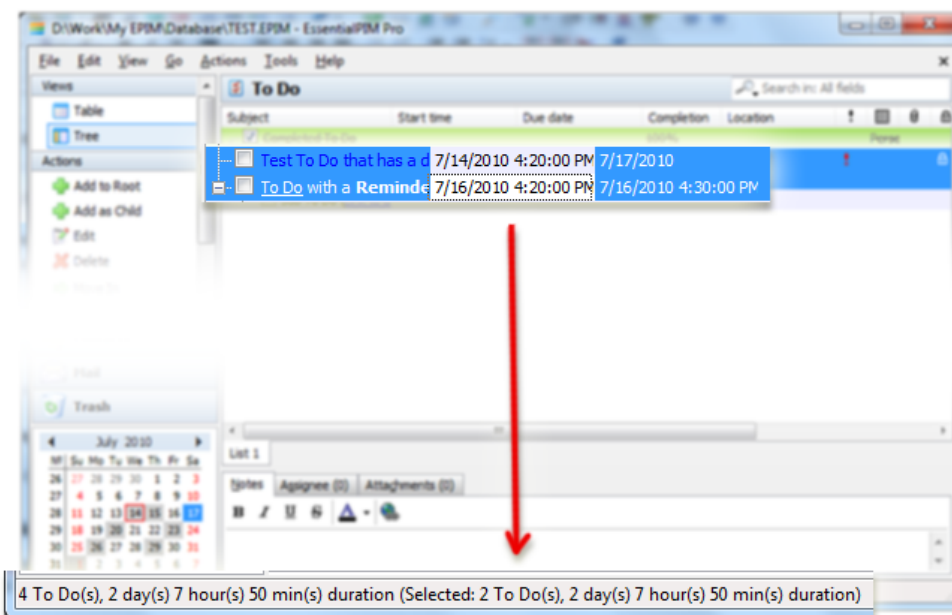
EssentialPIM Pro has advanced filtering feature which allows to filter records by various criteria. Pressing the **Filter** button from Actions pane in the left enables filters for each column in the To Do list.



Each drop-down list represents all possible values entered to given field. You can select necessary values in several columns to do complex filtering.

Time calculations

EssentialPIM Pro can calculate time spent on several To Dos. Select necessary To Dos and look at a status bar at the bottom of the window. It calculates total time of all visible and selected items.



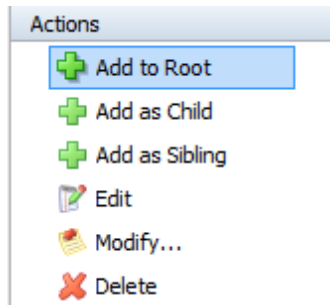
If status bar is not visible then enable it under **View -> Status Bar**.

4.5 Notes

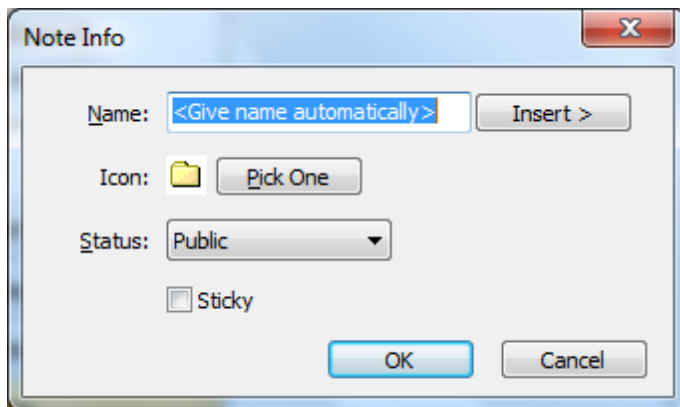
4.5.1 Adding a note

Notes can hold formatted text, tables and images (.jpg, .bmp, .ico, .emf, .wmf formats supported).

To add a new note, press **Add...** button on a left-side bar.



Then enter the name for the note in appeared dialog (or leave it as it is, in this case EssentialPIM Pro will name the note automatically from the first words you type inside the note):



You can insert current Date and Time to the name field, using **Insert** command or shortcuts **Ctrl+D** (Day) and **Ctrl+T** (Time)

In the lower window now you can enter the text, insert pictures, tables and lists. Use the toolbar to edit the text in the note.



4.5.2 Notes managing

Arranging Notes

Notes could be arranged in hierarchical structure. It could be edited using standard drag & drop feature. Notes could be also arranged using Actions bar tools:

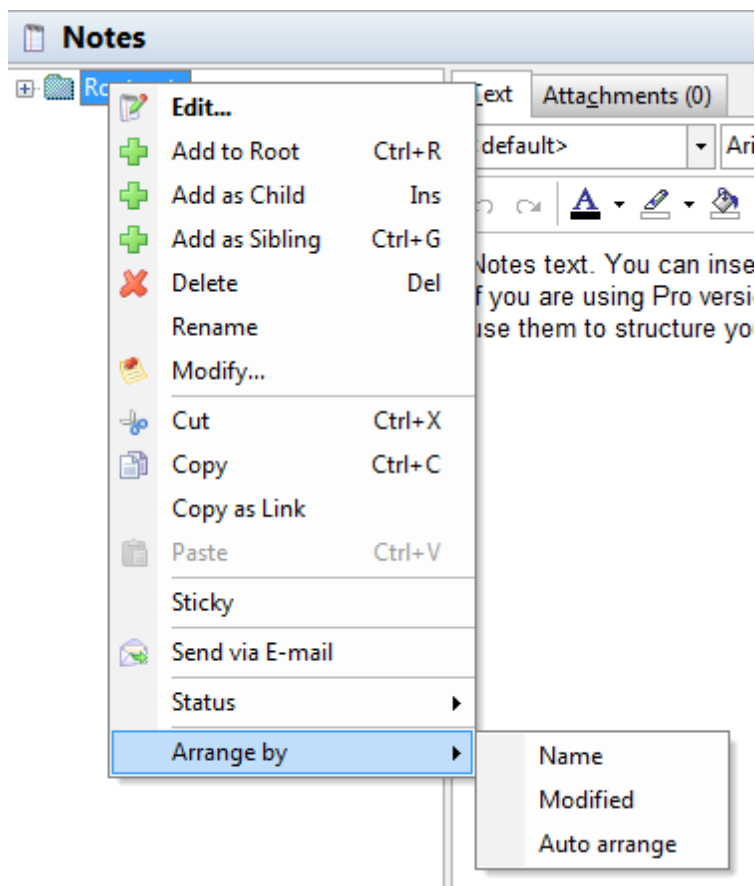
Add as Child button creates a sub-note to a current one.

Add as Sibling adds a To Do to an active tree.

Move In/Out and **Move Up/Down** buttons could be used to edit hierarchical structure. It's also possible to drag & drop Notes to each other to edit hierarchy. Position change is also possible using standard drag&drop feature.

Collapse/Expand All buttons easily collapse/expand the whole tree structure

Notes could be also automatically arranged by **Name** or Last **Modified** date:



Notes Tabs

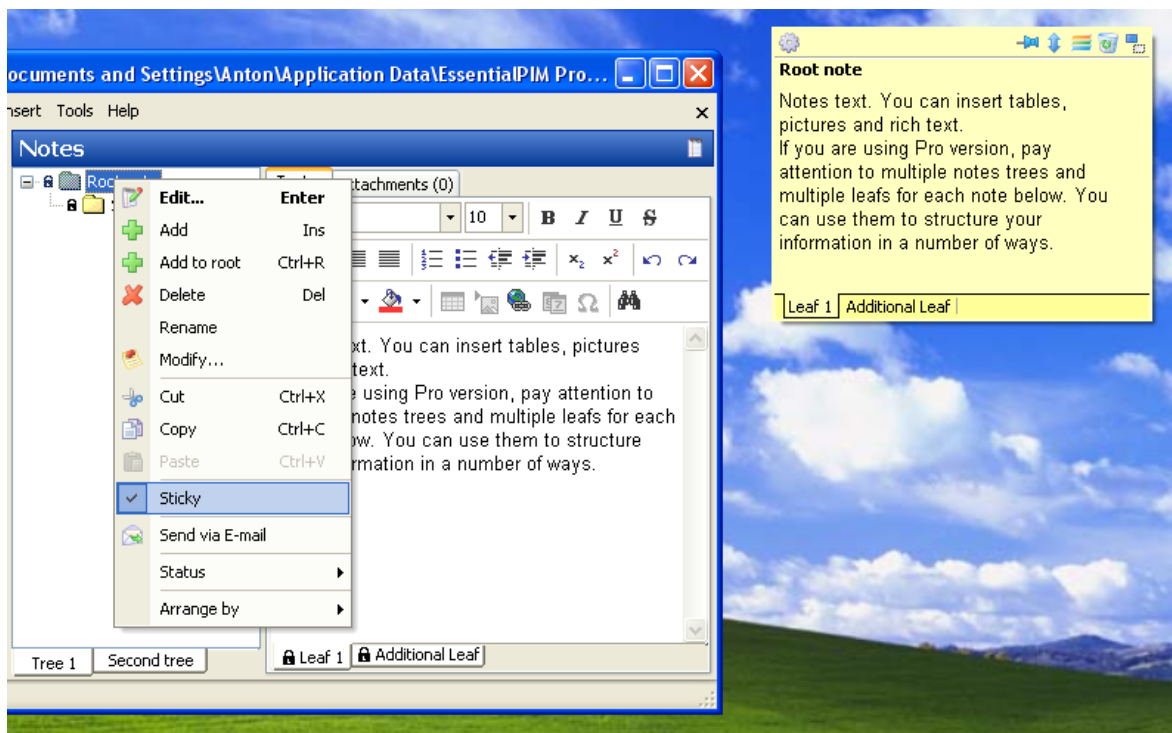
EssentialPIM allows to create several notes trees. Tabs are used for this in EssentialPIM. Right-click a default tab and choose necessary option:

- **Rename** - renames current tab
- **Add** - adds new tab
- **Delete** - deletes current tab
- **Color** - adds color decoration to a tab name
- **Status** - assigns Private or Public status

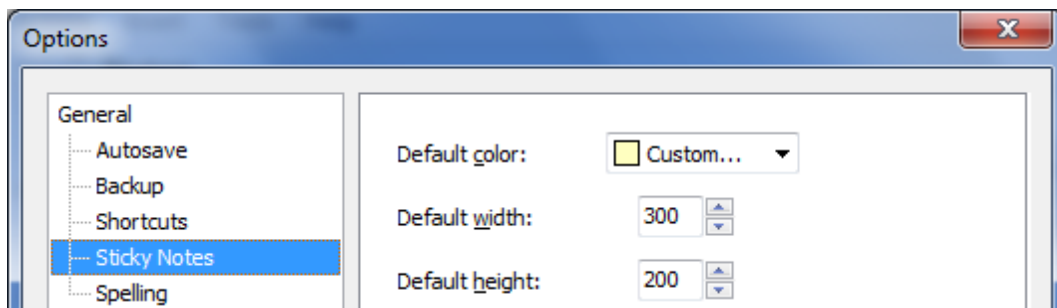
Notes or notes trees could be moved between tabs using drag&drop.

4.5.3 Sticky notes

Each Note in EssentialPIM could be stuck to your desktop as a nice colored note. To make a note sticky use **Sticky** option from notes context menu:



Sticky notes default options could be found at **Tools -> Options -> Sticky Notes**:



You can set default size and color for newly created notes.

Each sticky note has it's own tool panel:



It can set note to:

Stay on Top - note will be displayed in the top of all windows.

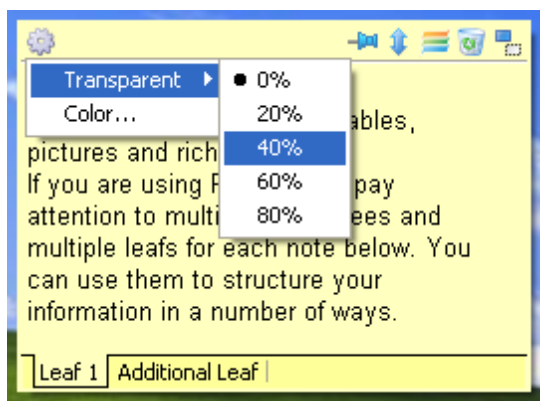
Roll up/down - rolls note up and down

Edit in EPIM - opens note in EssentialPIM

Delete - puts note to Trash

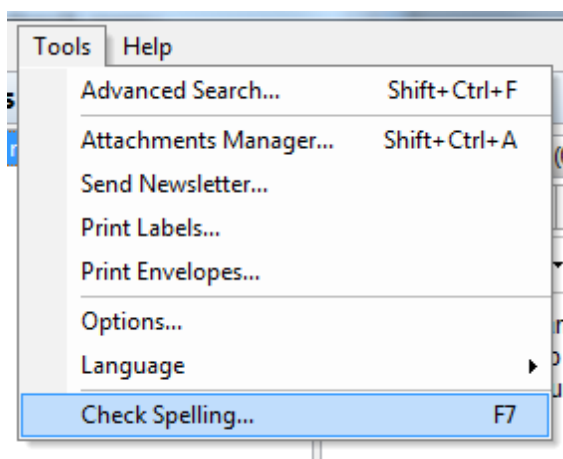
Hide - disables Sticky option

Displaying options such us **Color** and **Transparency** could be set in **Settings** menu:

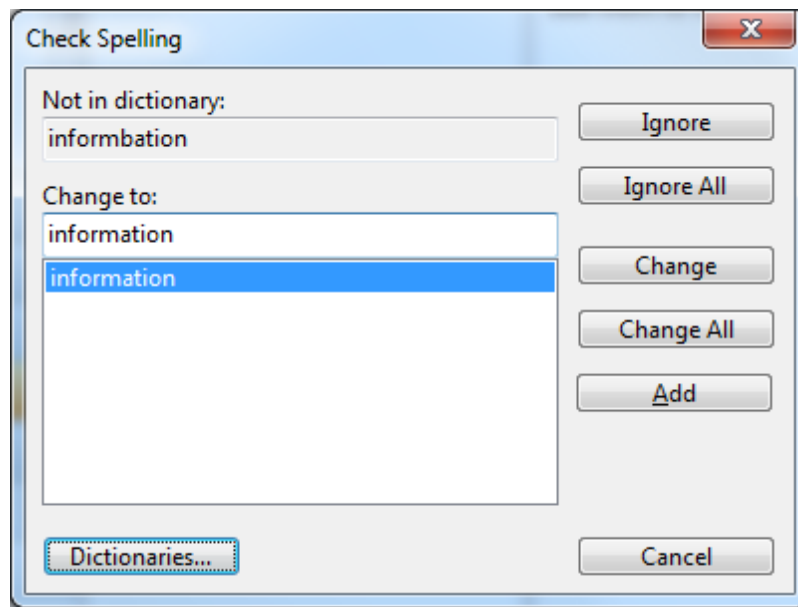


4.5.4 Spell check

EssentialPIM Pro provides built in spell checker in Notes. You can call spelling check by pressing **F7** or under **Tools -> Spelling check** menu.



This will call a dialog which proposes general spelling check features:



Ignore - ignores current occurrence of the word

Ignore All - ignores all occurrences of the word

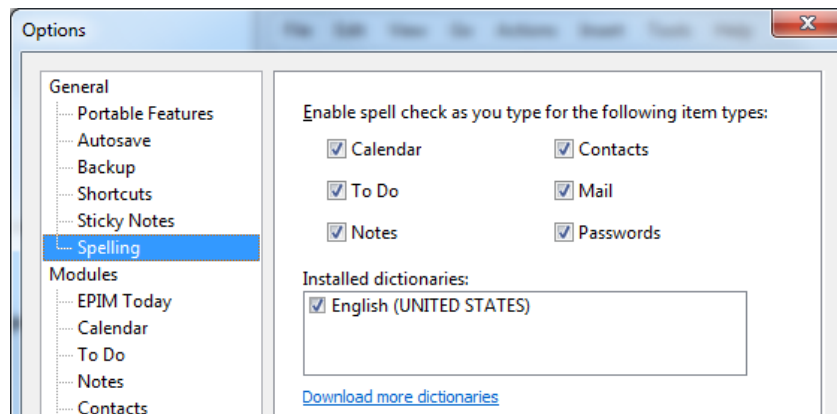
Change - changes the word to a selected variant

Change All - changes all occurrences of the word to a selected variant

Add - adds word to a dictionary

Dictionaries - allows to change dictionary

Spelling check options are available under **Tools -> Options -> Spelling**



It includes US dictionary by default but you can download and add necessary dictionaries from our site. Once you'll download a dictionary file follow these instructions:

If you are using Desktop version:

- Unpack the files into C:\Documents and Settings\User_Name\Application Data\EssentialPIM (for Windows XP)
- Unpack the files into: C:\Users\User_name\AppData\Roaming\EssentialPIM (for Windows Vista and Windows 7)*

If you are using Portable version:

- Unpack the files into EssentialPIM installation directory
- Unpack the files into \Documents\EssentialPIM Portable (for U3 flash drives)

Run the program, the installed dictionary should be instantly available.

* - Note, some folders are hidden and could not be visible by default. You should enable displaying of hidden folders first.

4.6 Contacts

4.6.1 Adding a contact

Contacts can hold all of your contacts. It supports Groups, unlimited custom fields, sorting and multiple views.

To add a contact press **Add Contact** button in the Actions bar. Enter the data for your contact, in the pop-up window. Select from different tabs in the contact edit window to enter **Personal Info**, **Business** and **Notes**.

Contact Info

Personal Info Business Notes Picture Attachments

First Name Test

Last Name Contact

Mobile +1190-009-003

Phone

Email me@server.com

Address Street 12

City Town

State

Postal 123456

Country Country

ICQ

MSN

Webpage www.server.com

Birthday 7/14/1990 ☐ Reminder before 0 day(s)

Membership

Add Field...

Edit Field...

Delete Field

Move Up

Move Down

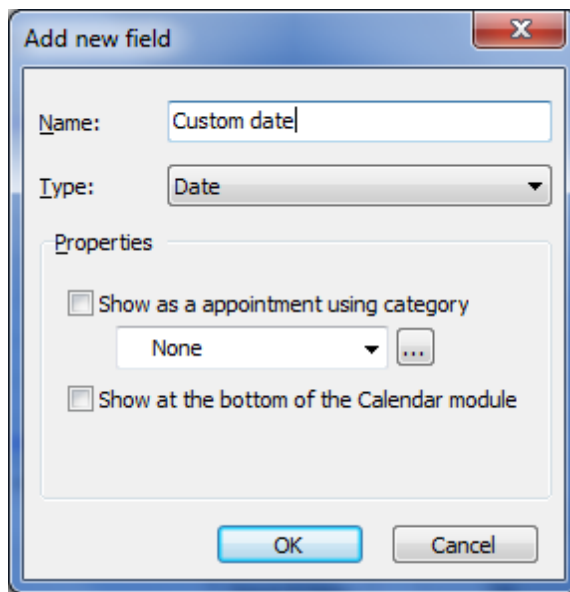
Status: Public

Save & New OK Cancel

Custom fields

To add a custom field, click on a **Add field** button. Enter the name for the field and data type which will be stored in it. There are flowing data types available for contact fields:

- **Text/Number** - standard text format which could contain any text or number info
- **Date** - stores date



Show as task using category enabled will automatically create annual event in **Calendar**.

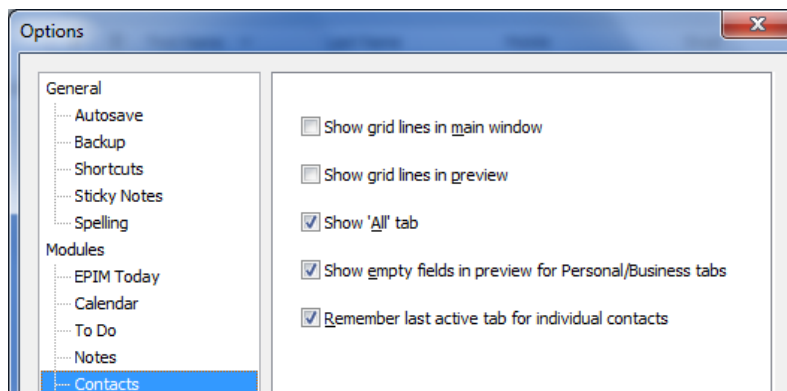
Show at the bottom of the Calendar module option adds a notification to Calendar 3 days before event.

- **Drop-down list** - creates drop-down list with values in corresponding field
- **Yes/No** - creates drop-down with two logical values like Yes/No, True/False, On/Off or custom use values
- **Check box** - standard check box

Contacts can hold pictures and photos, for each contact (**Contact Info -> Picture**). You can later export the picture from EssentialPIM Pro to your hard drive again (Save...)

Contacts options

Contacts options are available under **Tools -> Options -> Contacts**



Show grid lines in main window - enables grid in contacts list

Show grid lines in preview - enables grid in preview tabs at the bottom of Contacts

view

Show 'All' tab - enables tab that shows all info entered in Personal and Business tabs.

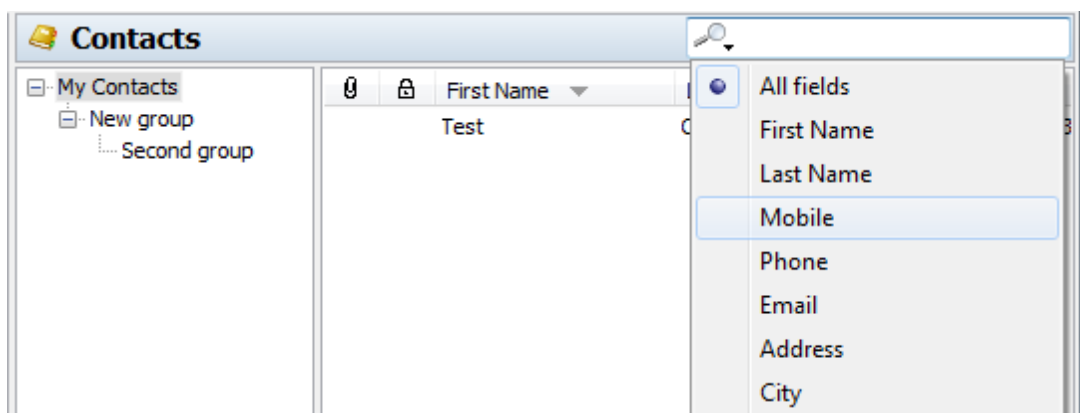
Show empty fields in preview - enables/disables displaying of empty fields in Personal and Business preview tabs at the bottom of the screen.

Remember last active tab for individual contacts - remembers what tab was used for each contact and opens it by default.

4.6.2 Contacts managing

EssentialPIM supports various ways of displaying, searching and managing options.

To search a contact start writing in the search field. You can also limit the search by a certain field by choosing specified field from drop down menu.

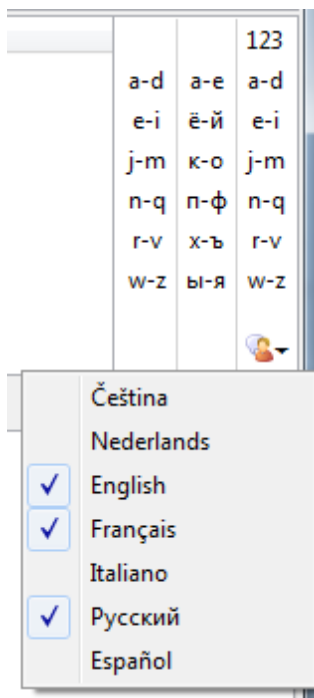


To change fields shown in the main window, right-click fields names in the main window and put check on the fields that need to be shown. If you need to change several fields, right-click fields names and choose **Customize** option.

To edit a contact double-click it in the main view. This will open Contacts info dialog. Edit any of the fields and press OK.

To sort contacts click on field caption in order to sort by it. Holding Ctrl button will allow to sort by several fields.

Letters panel allows easily navigate to a specific letter or number in contacts list.



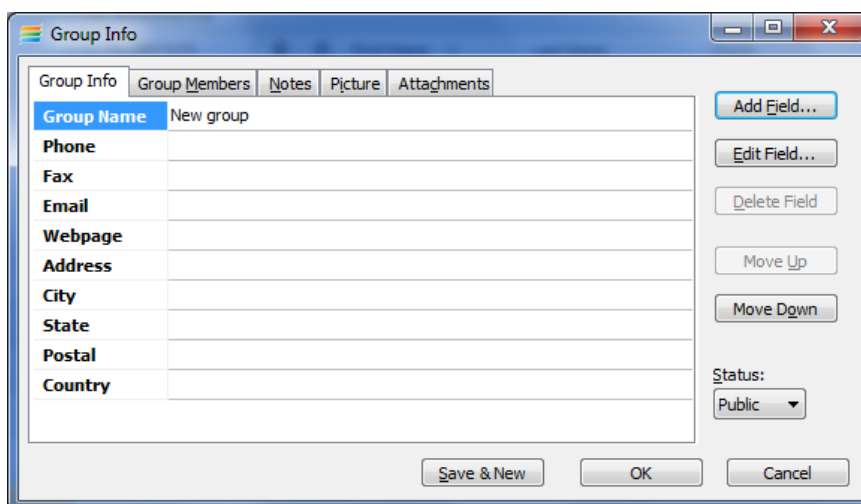
This panel may include multiple language alphabets.

Contacts Groups

Groups is easy way to organize large amount of contacts.

To create a **Group** press **Add Group** button in the left-side Actions bar.

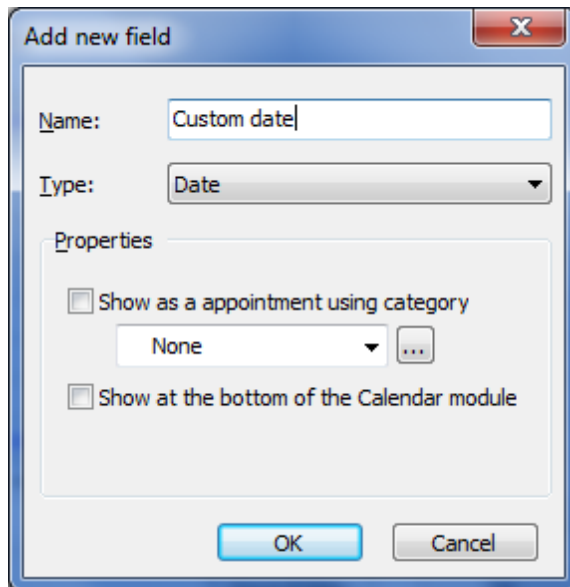
In a pop-up **Group Info** dialog you can specify **Group info** and add **Group members** from all contact list using **Group members** tab.



Custom fields

To add a custom field, click on a **Add field** button. Enter the name for the field and data type which will be stored in it. There are following data types available for contact fields:

- **Text/Number** - standard text format which could contain any text or number info
- **Date** - stores date



Show as task using category enabled will automatically create annual event in **Calendar**.

Show at the bottom of the Calendar module option adds a notification to Calendar 3 days before event.

- **Drop-down list** - creates drop-down list with values in corresponding field
- **Yes/No** - creates drop-down with two logical values like Yes/No, True/False, On/Off or custom use values
- **Check box** - standard check box

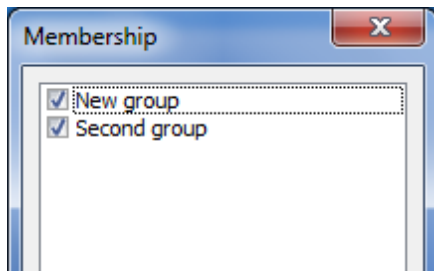
Contacts Membership

Groups could be arranged in tree structure. To make a sub-group just drag needed group to parent group holding left mouse button.

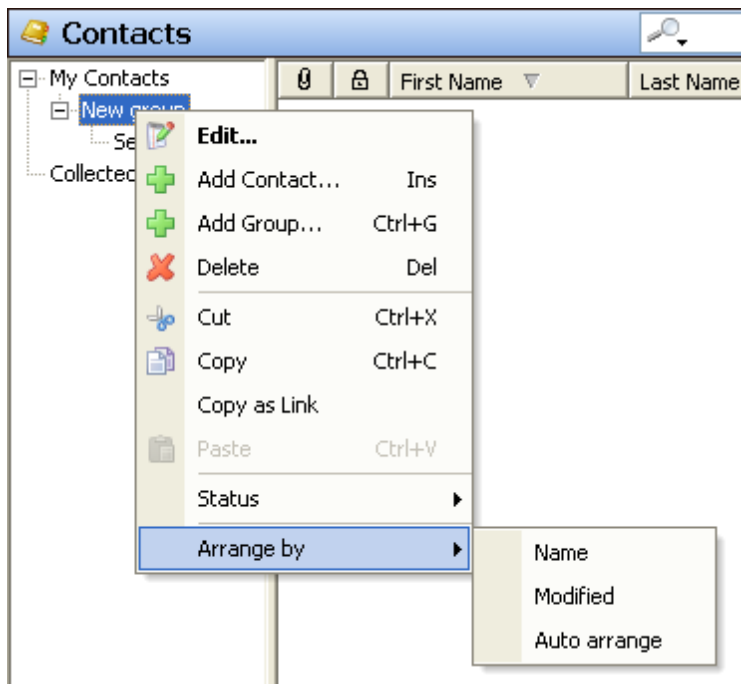
Each contact could be a member of several groups. You can easily move contacts from one group to another using drag&drop. You can also edit each contact membership in special Membership field:



It could be found at the bottom of Contacts screen or in Contact Info dialog. By pressing "..." button there will be a pop-up dialog where you can enable preferred groups:



Groups could automatically arranged by **Name** or Last **Modified** date:

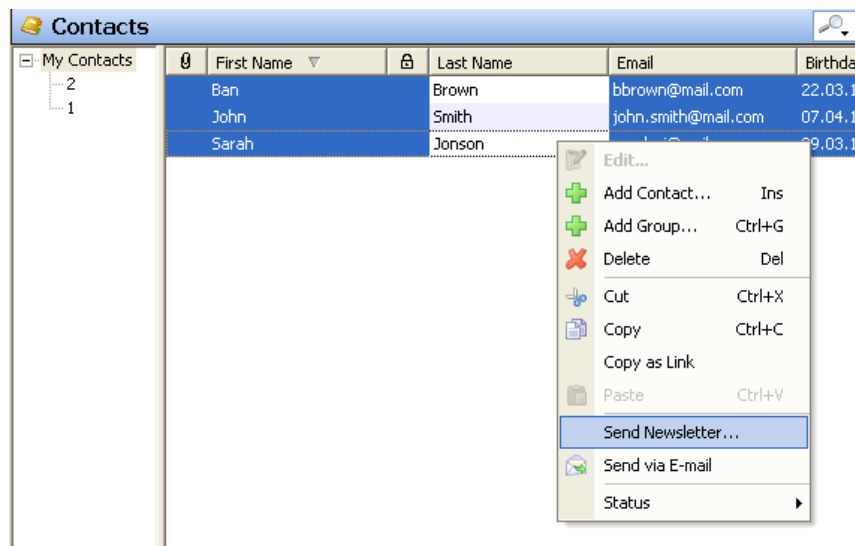


4.6.3 Newsletter

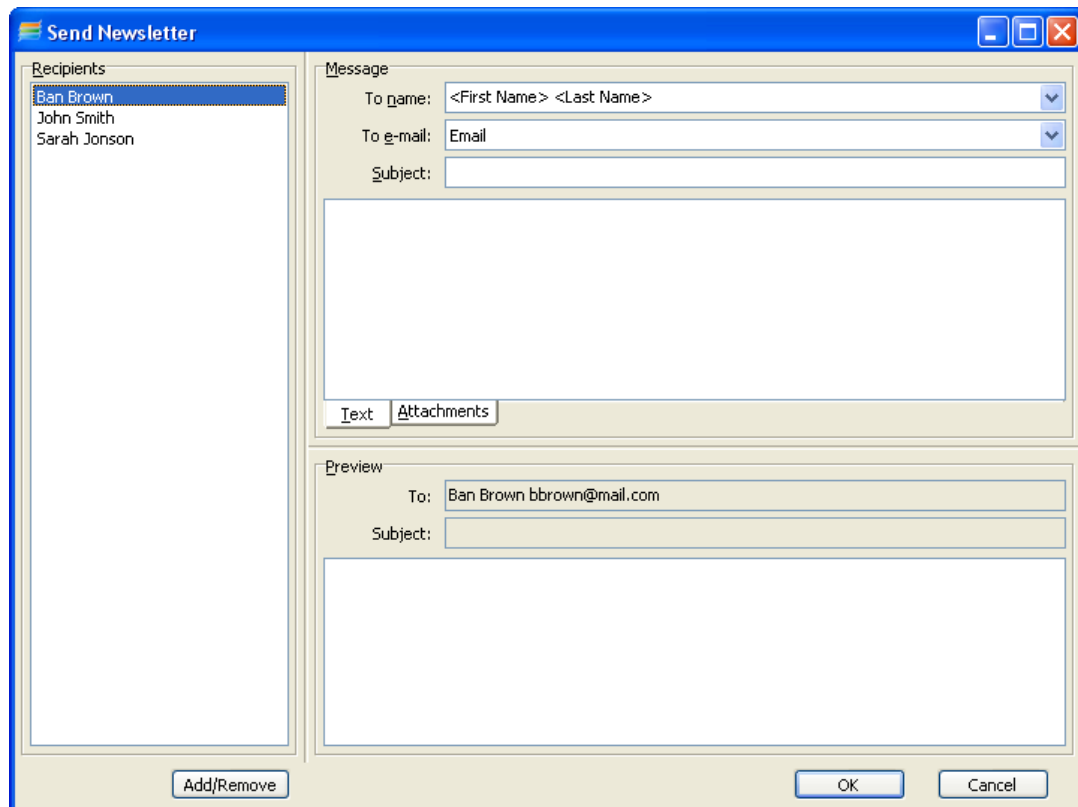
EssentialPIM Pro allows you to send send template composed e-mail to multiple recipients from Contacts.

To use EssentialPIM Newsletter:

1. Select at least one entry in EssentialPIM contacts. Use CTRL (Shift) + left-click to select multiple entries. Go to **Edit -> Select All** to select all entries. Anyway, recipients list could be edited in **Newsletter** dialog.
2. Right click the selection and choose **Newsletter** option in context menu.



3. The **Send Newsletter** dialog will appear which consist of three blocks: **Recipients**, **Message**, **Preview**.



Using Message block

The **Message** block is used to compose letter template for your mass mail. EssentialPIM allows to use every field of contact entry as tag. In **To name** field you can use any fields of a contact info entries as tags or any text. The contents of that field will be placed in header of your letter. The result you can

see in **To** field of the **Preview** block.

In **To e-mail** drop down menu you can use only fields which contains valid e-mail addresses. It will be used to send e-mails.

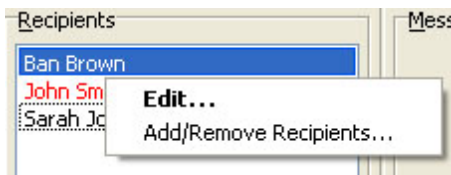
The Message block memo field contains the text of the letter you are sending. You can also use tags here.

This field has an additional **Attachment** sheet. Here you can add, delete, open attachment or save it with other name.

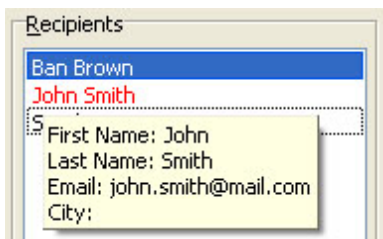


Using Recipients block

This block contains list of mass mail recipients. Here you can add/remove recipients to/from list or edit their info. Right-click on a field or entry to use one of its features.



When using tags it can happen that some fields in contact info where not filled, such entries will be highlighted with red font in recipients list. You can see missing values in a tip when pointing cursor on interested entry in list. To fix it use **Edit** feature and add missed values.



You can Add/Remove recipients via special dialog, it contains two lists – your recipients list and list of database contact entries. You can edit recipients list by using arrow buttons in the dialog.

Using Preview block

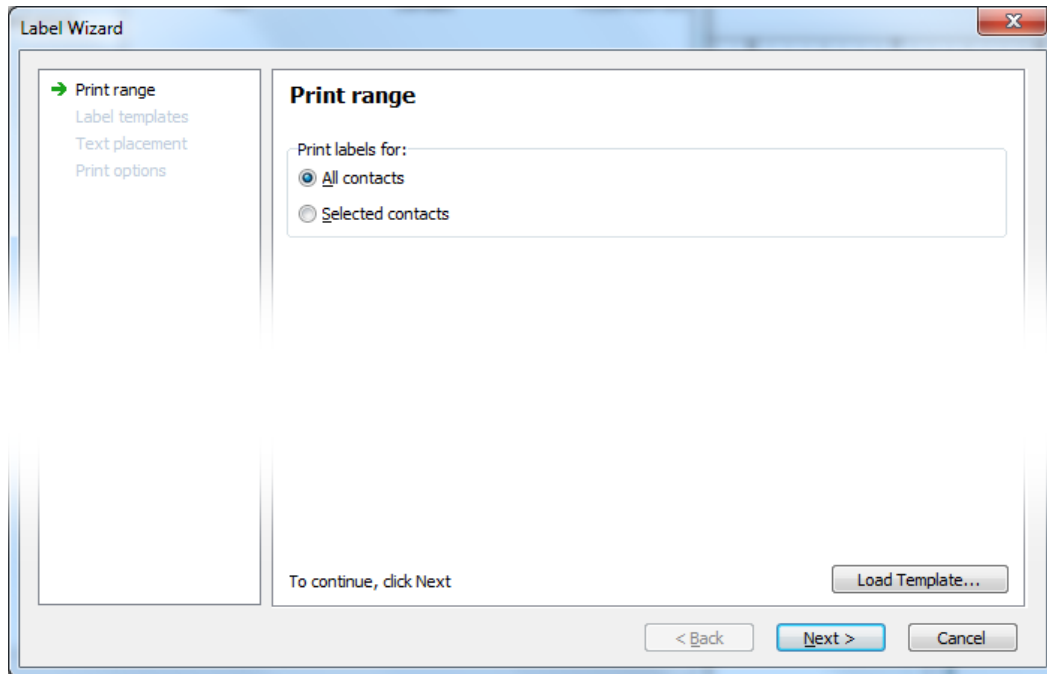
This block is used to browse final view of every letter. There are no possibility of editing here but browse only. If you are sure that everything is fine than click **OK** in **Send Newsletter** dialog. Your letters will be sent via default e-mail client.

4.6.4 Print labels

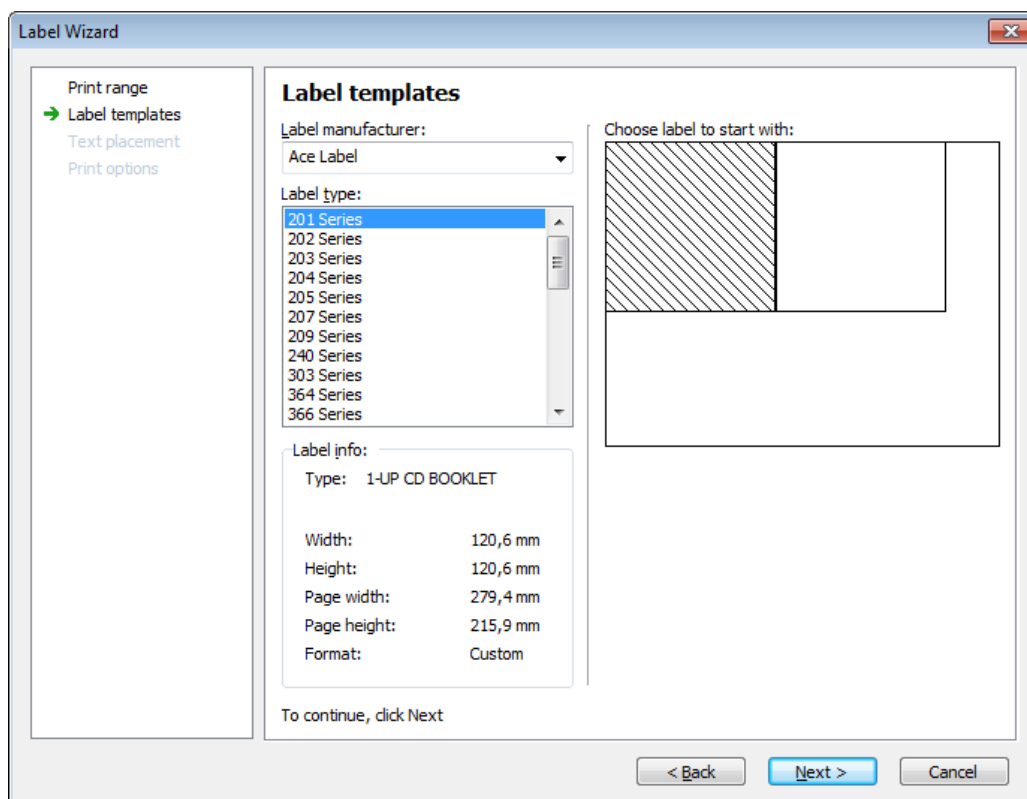
EssentialPIM Pro allows to print labels of various manufacturers and sizes. Go to **Tools** -> **Print Labels** menu.

Easy to use wizard will guide you through label creation process.

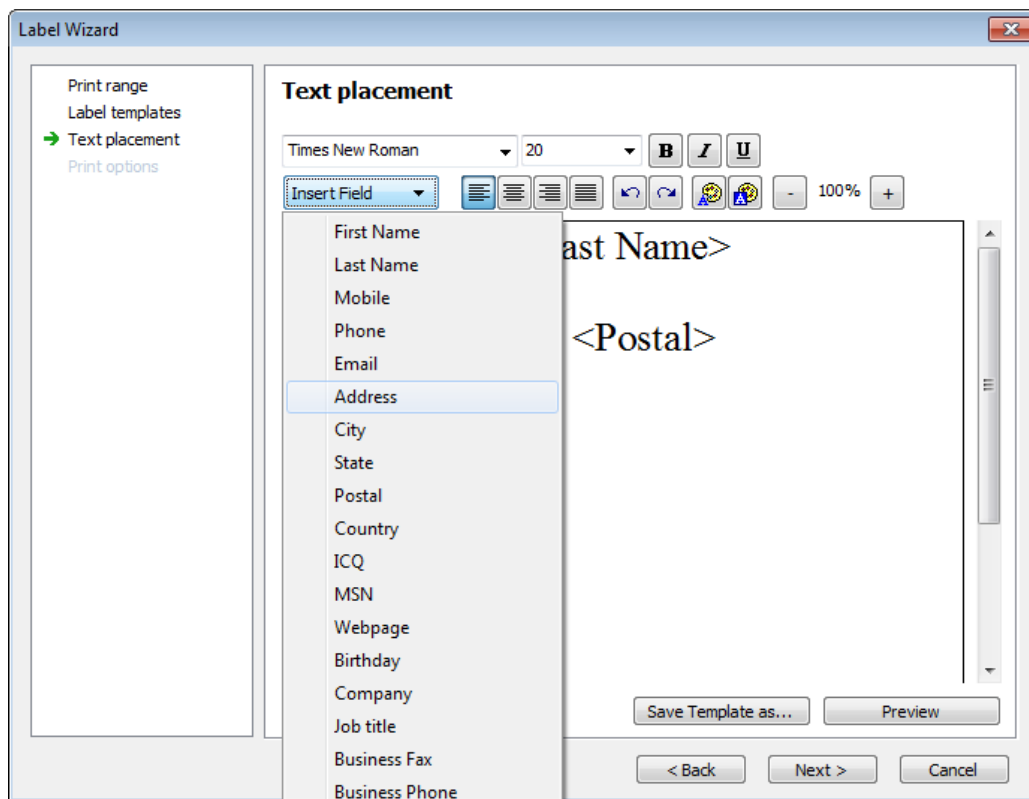
Step 1. Choose from what contacts to create labels. It also allows to load pre made template. Press **Load Template** button for this.



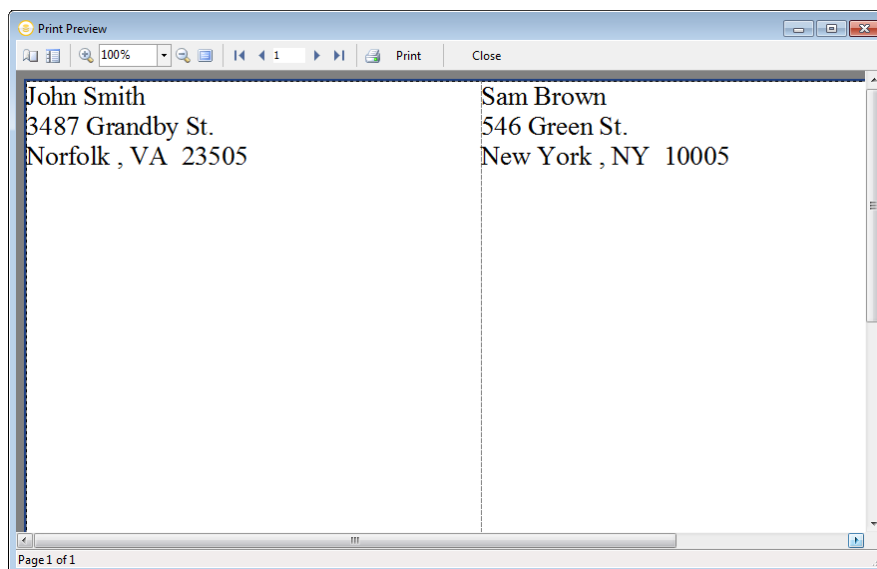
Step 2. Choose label manufacturer and type.



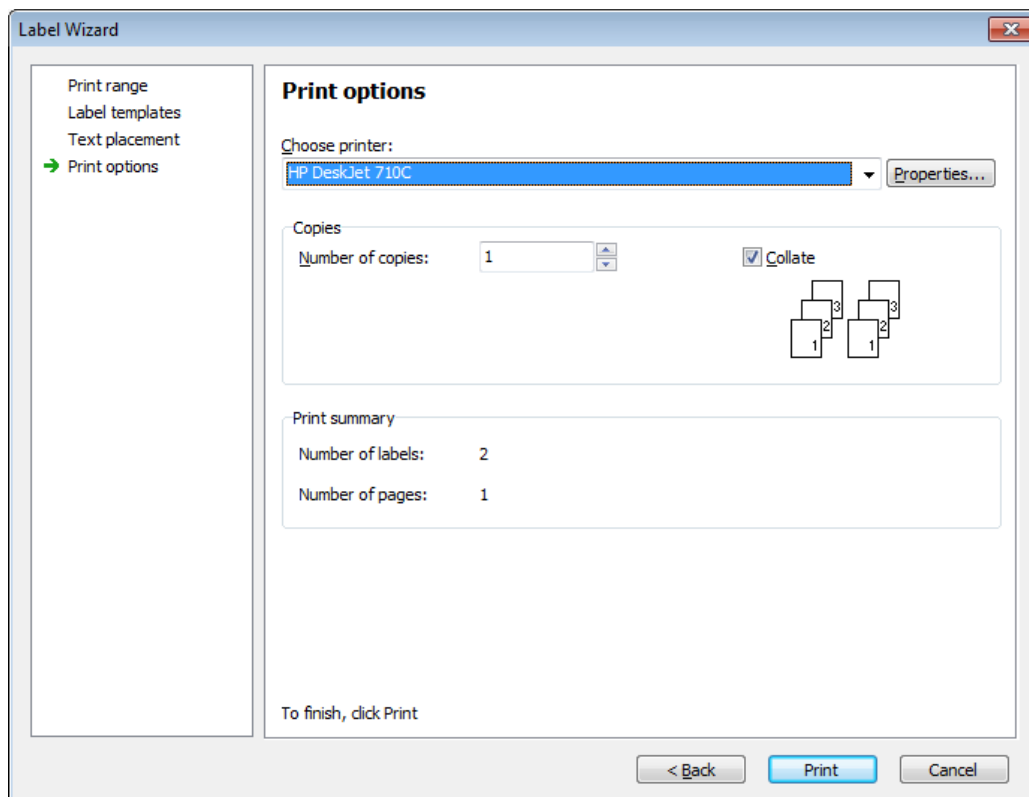
Step 3. Compose a label. You can add any contacts field to a label as tag. Editor dialog has basic text editing features which allow to compose nice looking label pattern. On this step you can also save your work as a template to use in further. Press **Save Template as** button for this.



Preview button allows to control the process.



Step 4. Set number of copies and general printing options (if necessary)

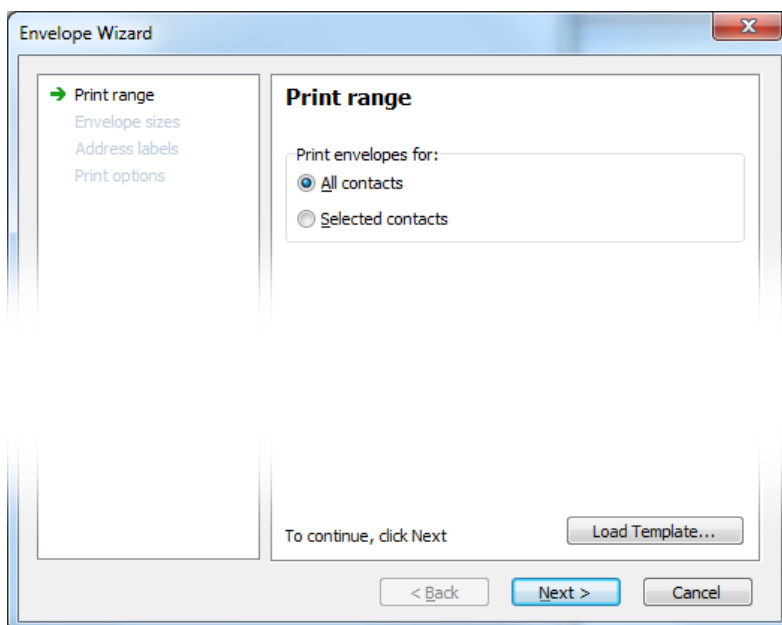


4.6.5 Print envelopes

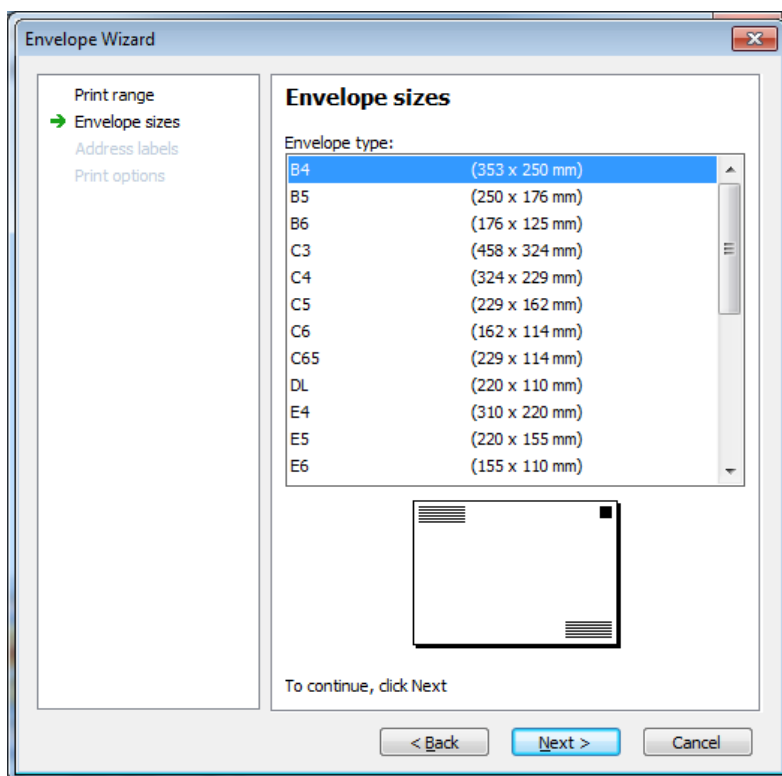
EssentialPIM Pro allows to print on envelopes of various sizes. Go to **Tools -> Print Envelopes** menu.

Easy to use wizard will guide you through all the steps needed to create and print addresses on envelopes.

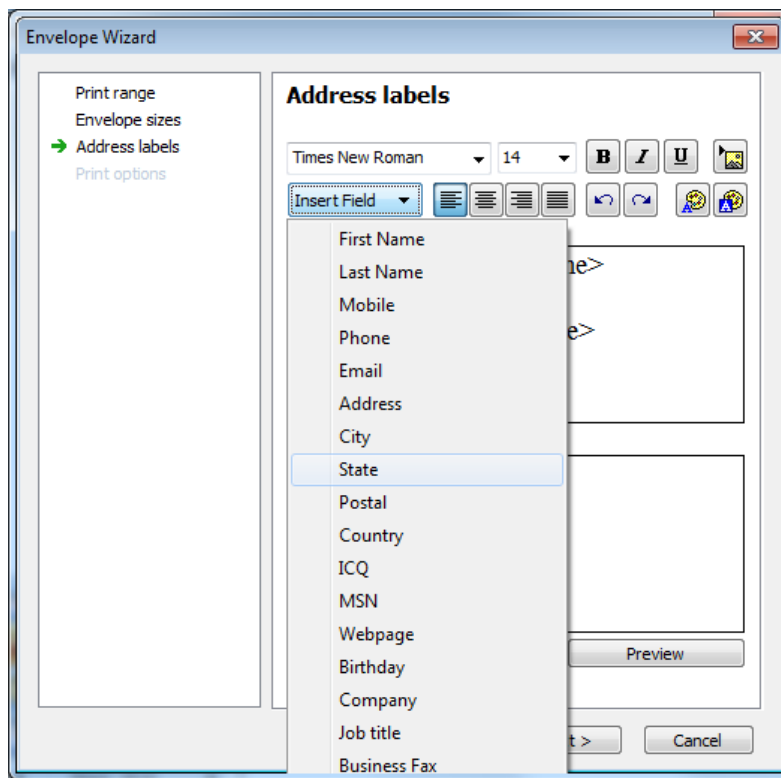
Step 1. Choose which contacts to print addresses for. If you would like to load a previously created template click on the **Load Template** button.



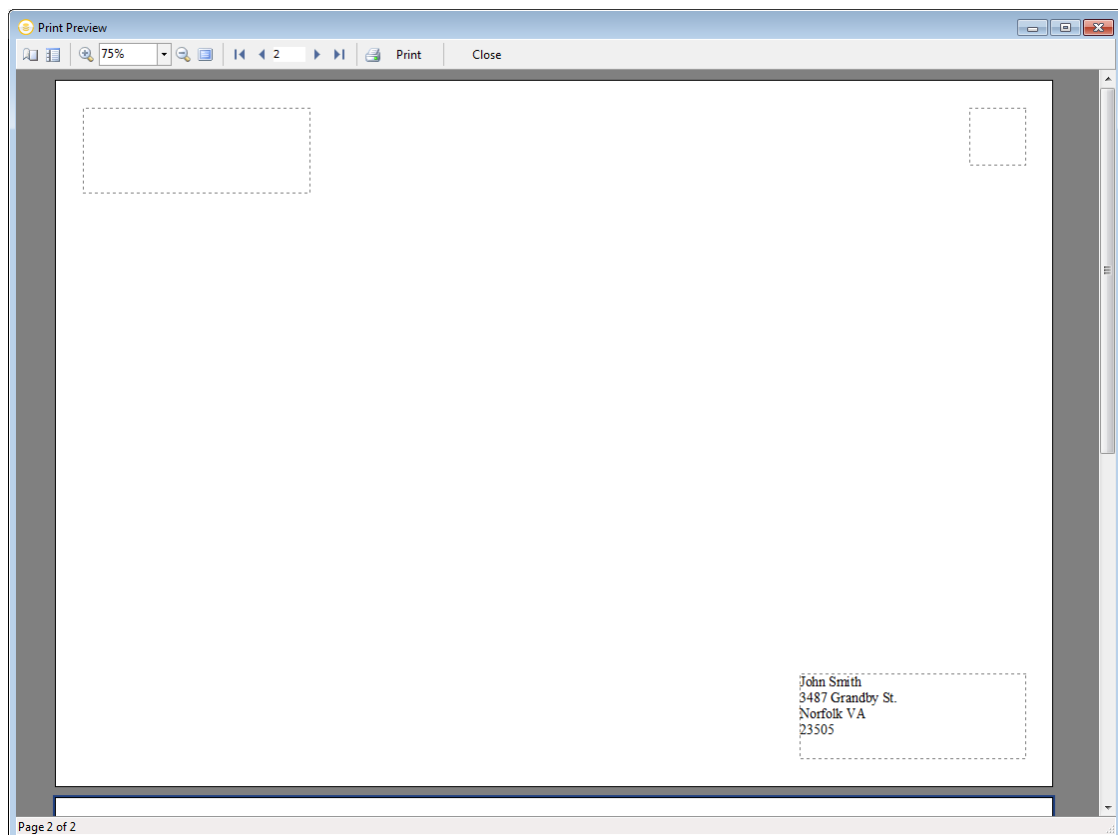
Step 2. Choose envelope type.



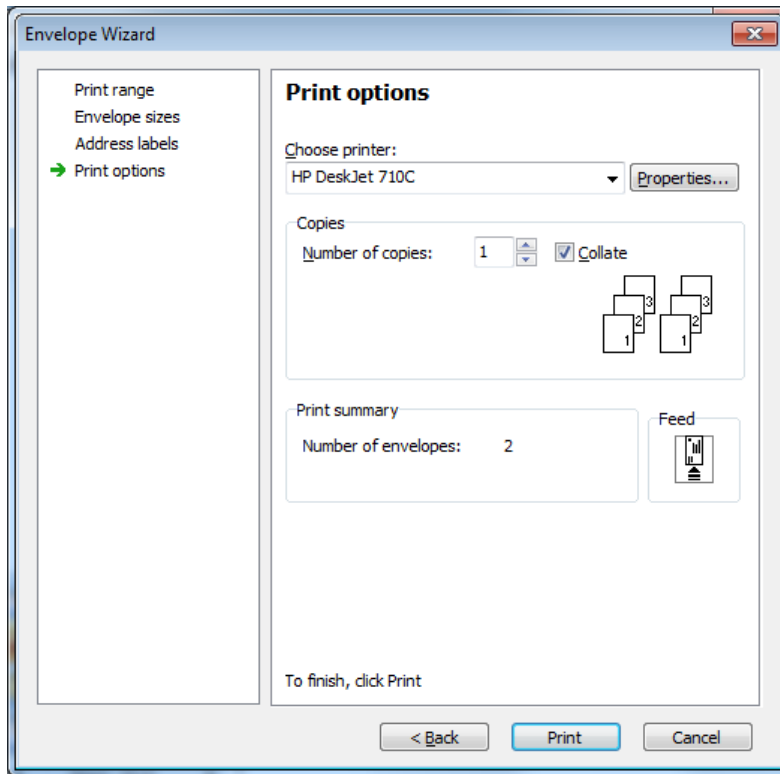
Step 3. Compose "To" and "From" addresses. You can add any contact fields to an envelop as a tag. Editor dialog has basic text editing features which allows to compose nice looking envelope patterns. On this step you can also save your work as a template for later use. Press **Save Template as** button for this.



Preview button allows to control the process.



Step 4. Set number of copies and general printing options (if necessary)



4.7 Passwords

4.7.1 Creating a password

Passwords module helps to manage password/login data for various services. To add a new record press **Add Entry** button or go to **File -> New -> Password Entry**. This will open the **Entry Info** dialog window.

Here you can enter password entry details including notes and add attachments.

Gen button helps to generate a random password for your entry, just check necessary options and press the **Generate** button:

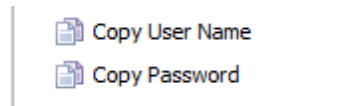
Custom fields

You can add your own fields for password entries. Click the **Add field** button and enter field name in the appeared dialog window. Edit field, Delete field, Move up and Move down buttons are used to manage existing fields.

4.7.2 Passwords managing

Using passwords

You can copy either User Name or Password into clipboard by selecting a desired password entry and clicking on **Copy User Name** or **Copy Password** buttons.

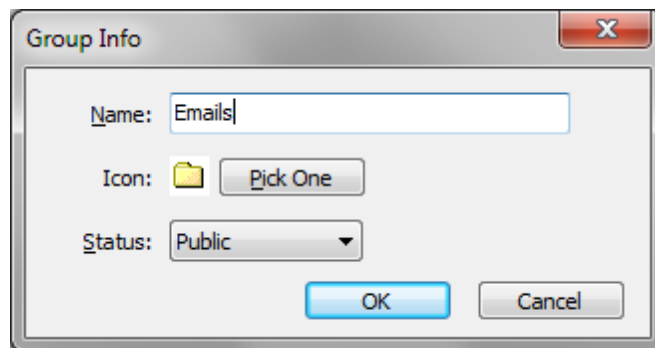


Another way is to double click on the User Name and Password fields of the desired password entry directly from the table. You'll see the "Data copied to clipboard" message in the status bar, indicating successful execution of the command.

Passwords Groups

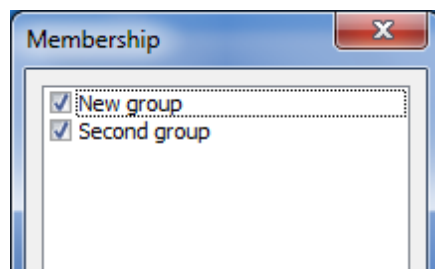
Groups offer an easy way to organize large number of password entries.

To create a password group press the **Add Group** button in the left-side Actions bar.



Groups could be arranged in tree structure. To make a sub-group just drag a desired group under the parent group holding the left mouse button.

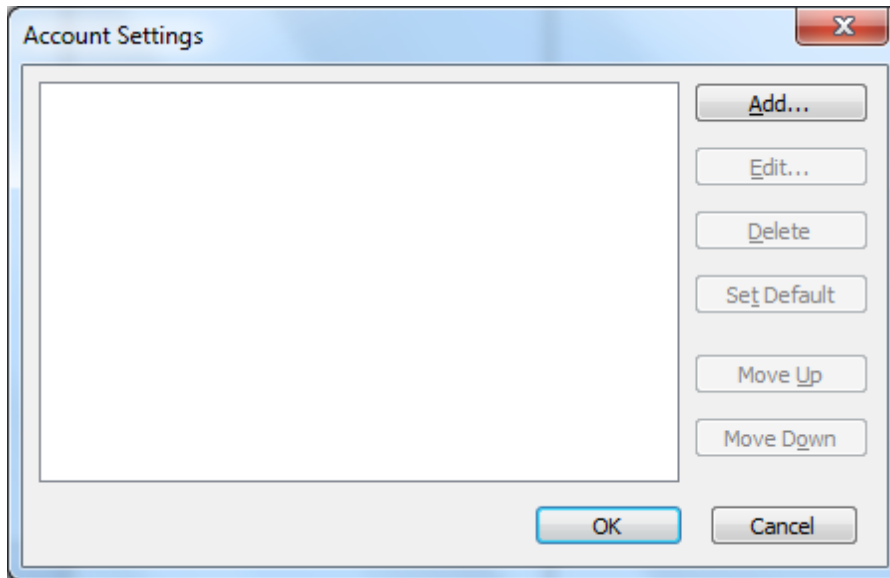
Each password entry can belong to several password groups. You can easily move entries from one group to another using drag&drop. You can also edit each entry membership in a special Groups field by pressing button with three dots.



4.8 Mail

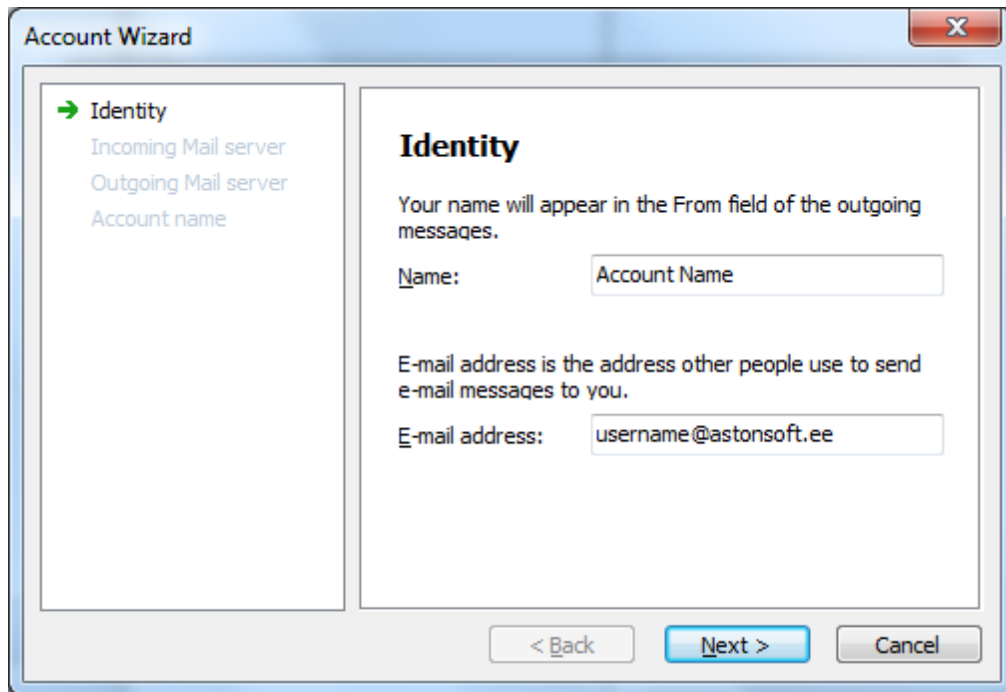
4.8.1 Creating an account

Click on the **Tools** menu and select the **Account settings** option. Then click on the **Add** button. Or go to **File -> New -> Mail Account**.



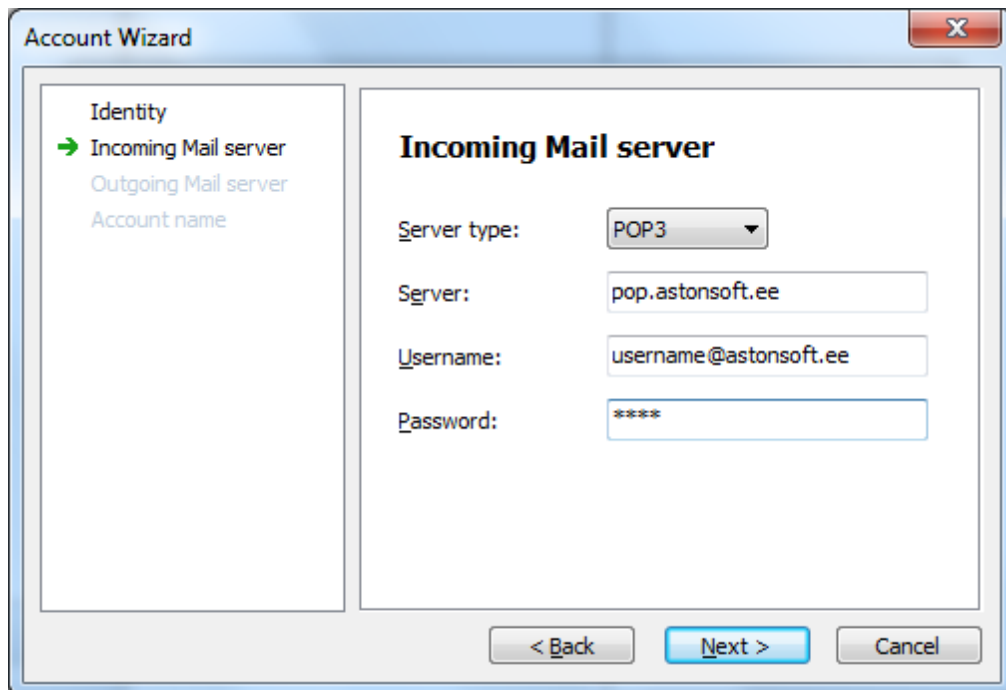
This will start a wizard which will guide you through whole procedure.

Step 1. Enter your name in the **Name** field, and your full email address (username@server.com) in the **Email address** field, then click on the **Next** button.



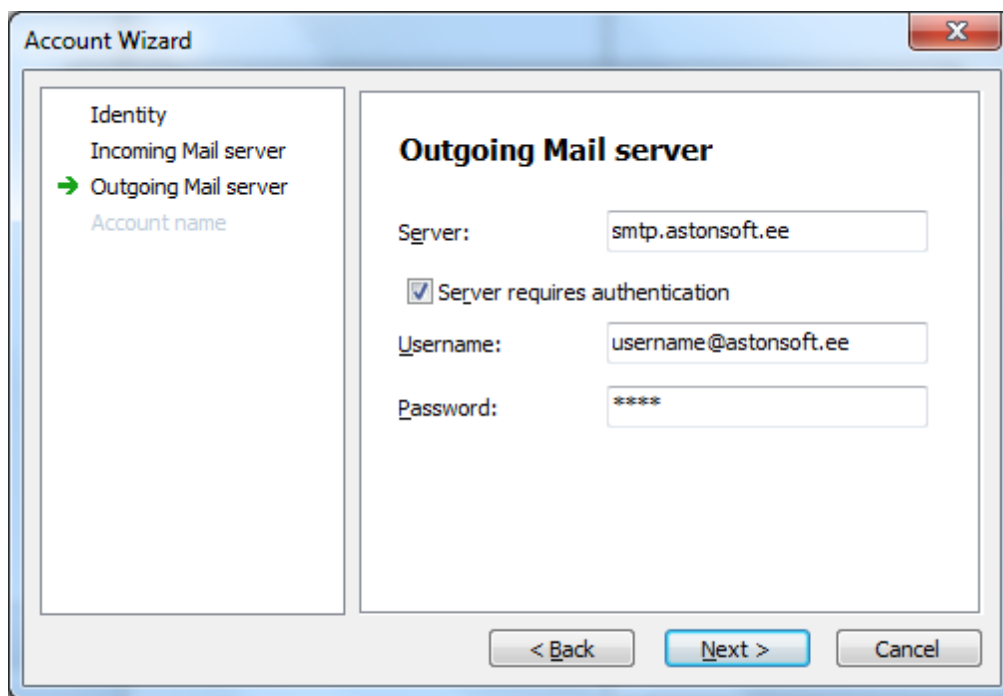
The screenshot shows the 'Account Wizard' window with the 'Identity' step selected in the left sidebar. The main area is titled 'Identity' and contains the following text: 'Your name will appear in the From field of the outgoing messages.' Below this is a text input field labeled 'Name:' with the value 'Account Name'. Further down, it says 'E-mail address is the address other people use to send e-mail messages to you.' followed by a text input field labeled 'E-mail address:' with the value 'username@astonsoft.ee'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Step 2. Select your server type, set address and login data for incoming mail, then click on the **Next** button. If you are not sure about your server type and address then you can check it in your mail provider Help area.



The screenshot shows the 'Account Wizard' window with the 'Incoming Mail server' step selected in the left sidebar. The main area is titled 'Incoming Mail server' and contains the following fields: 'Server type:' with a dropdown menu showing 'POP3'; 'Server:' with a text input field containing 'pop.astonsoft.ee'; 'Username:' with a text input field containing 'username@astonsoft.ee'; and 'Password:' with a text input field containing '****'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Step 3. Set a server address and login data for outgoing mail, then click on the **Next** button.



The screenshot shows the 'Account Wizard' window with the 'Outgoing Mail server' step selected in the left sidebar. The main area contains the following fields and options:

- Server:** smtp.astonsoft.ee
- ☒ **Server requires authentication**
- Username:** username@astonsoft.ee
- Password:** ****

At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Step 4. Enter name for your account then click on the **Finish** button.



The screenshot shows the 'Account Wizard' window with the 'Account name' step selected in the left sidebar. The main area contains the following fields and options:

- Account name:** username@astonsoft.ee
- ☐ **Use Global Folders**
Mail will be stored in one set of Global Folders and not in its own directory.
- ☐ **Check mail now**

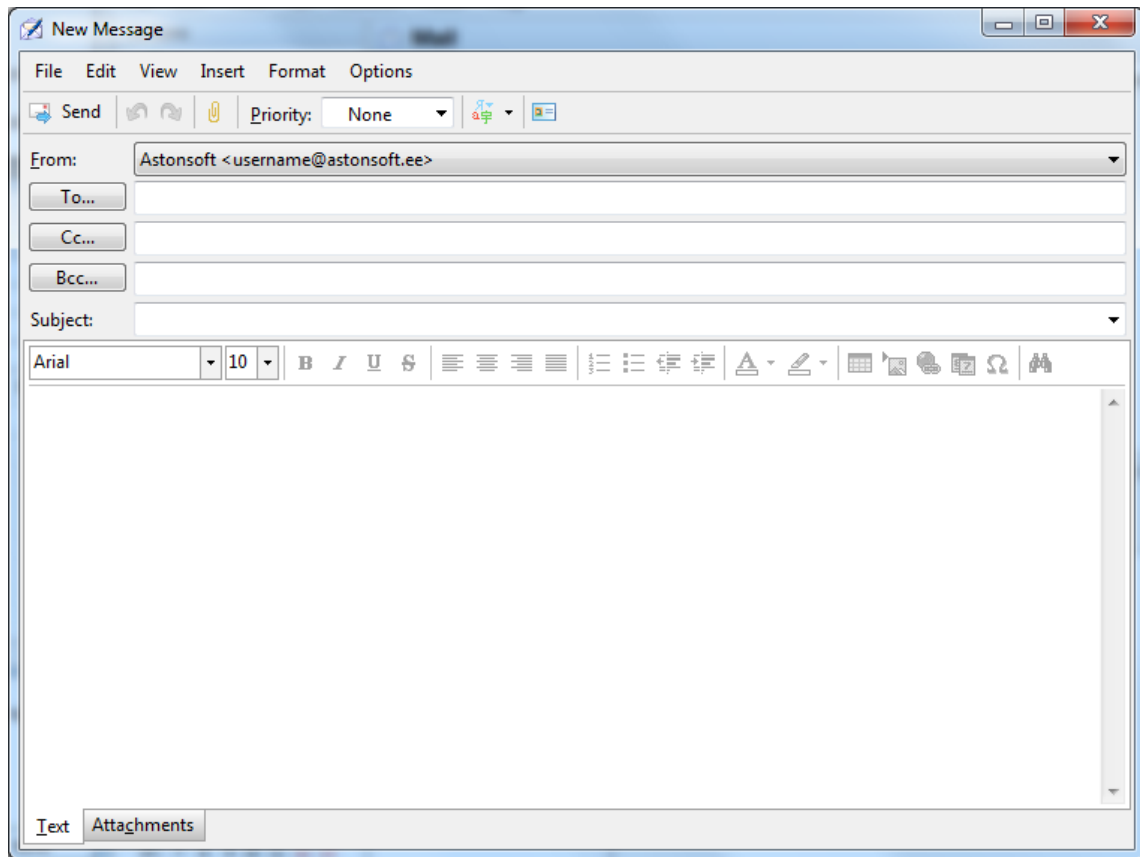
At the bottom, there are three buttons: '< Back', 'Finish', and 'Cancel'.

4.8.2 Managing mail

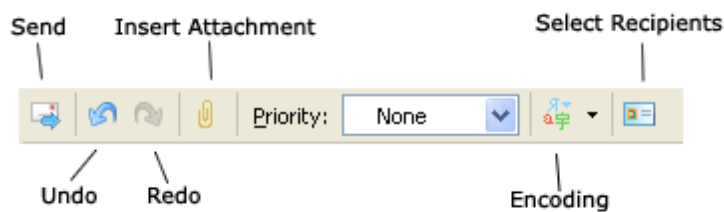
Creating a new message

Press **New Message** button from left actions bar to create a new mail.

This will open **New Message** dialog where you can compose a message.

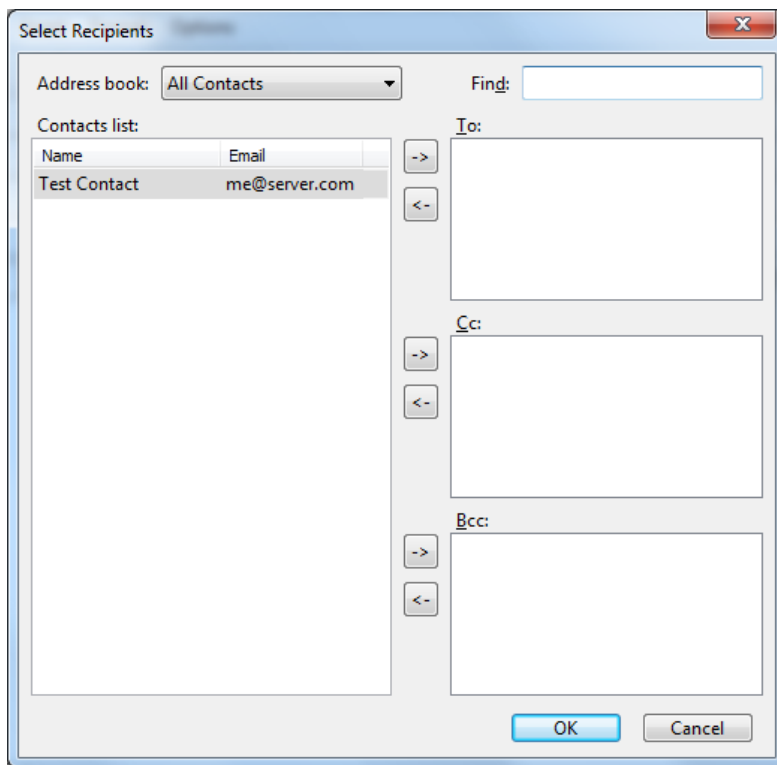


New message dialog tool panel represents all basic email editing features:



From menu contains the list of optional identities with signatures. This list could be edited under general account settings.

Pressing **Select Recipients** button will open corresponding dialog which allows to fill **To**, **Cc** and **Bcc** fields using EssentialPIMs contacts list.



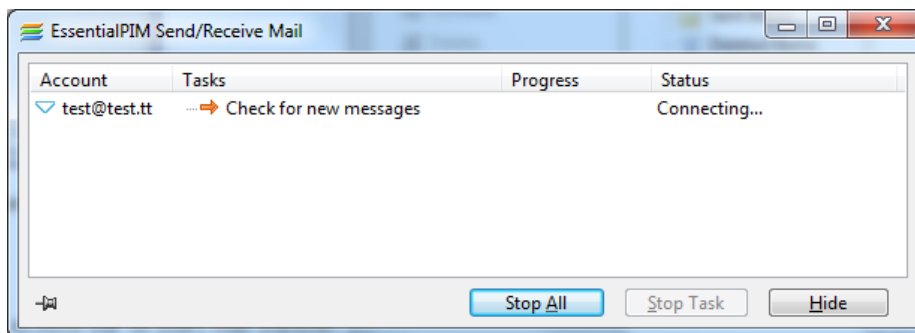
Note, this dialog lists contacts with **Fist Name** or **Second Name** fields filled only.

Once the message was created you can send* it by pressing **Send** button or save it as a draft just by closing dialog and saving message as draft.

Send/Receive mail

Press **Send/Receive** button from the left actions bar to start mail transfer. If you want only Send or Receive mail then use Send or Receive menus under Tools menu.

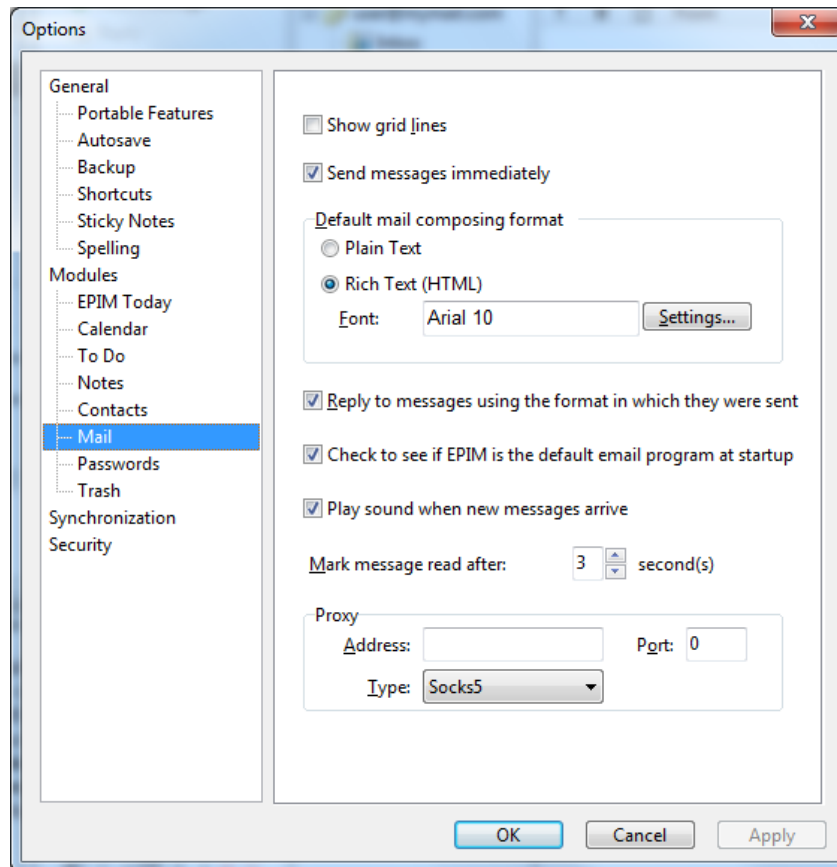
Send/Receive Mail dialog will show you status of the process



* - the message will be sent immediately or put to Outbox in accordance with mail options.

4.8.3 Mail options

General mail options are available from **Tools -> Options** menu.



Show grid lines - adds grid lines to Mail module to make mail list easier to read on high resolution monitors.

Send message immediately - enabling this option will send message immediately when pressing **Send** button within composing message dialog. Disabling this option will move message to Outbox folder first.

Default mail composing format - sets default format for new messages.

Reply to the messages using format in which they were sent - disabling this option will make replays in default mail composing format.

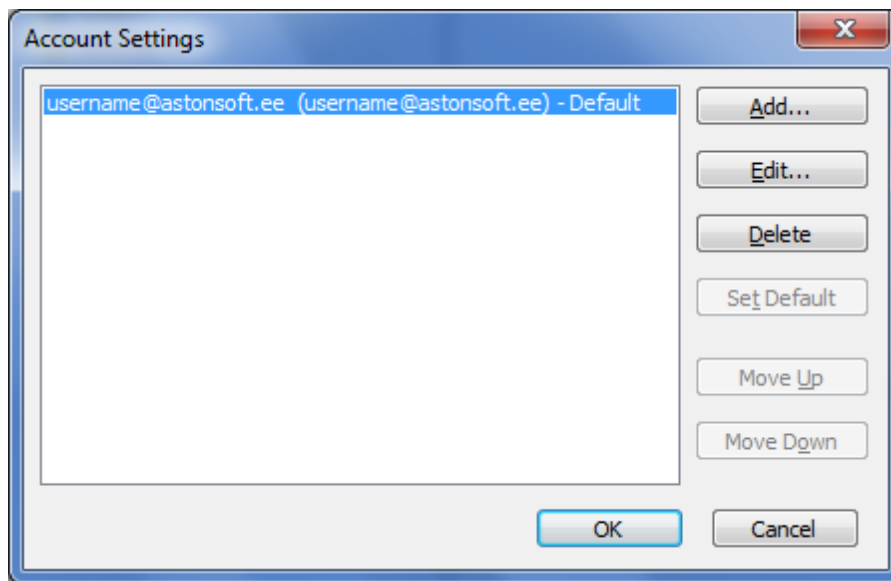
Check to see if EPIM is the default email program at startup - enable this option to be sure that EPIM will be always default email client.

Mark message as read - sets delay after which selected message become marked as read.

Proxy - allows to set up mail transfer via Proxy server.

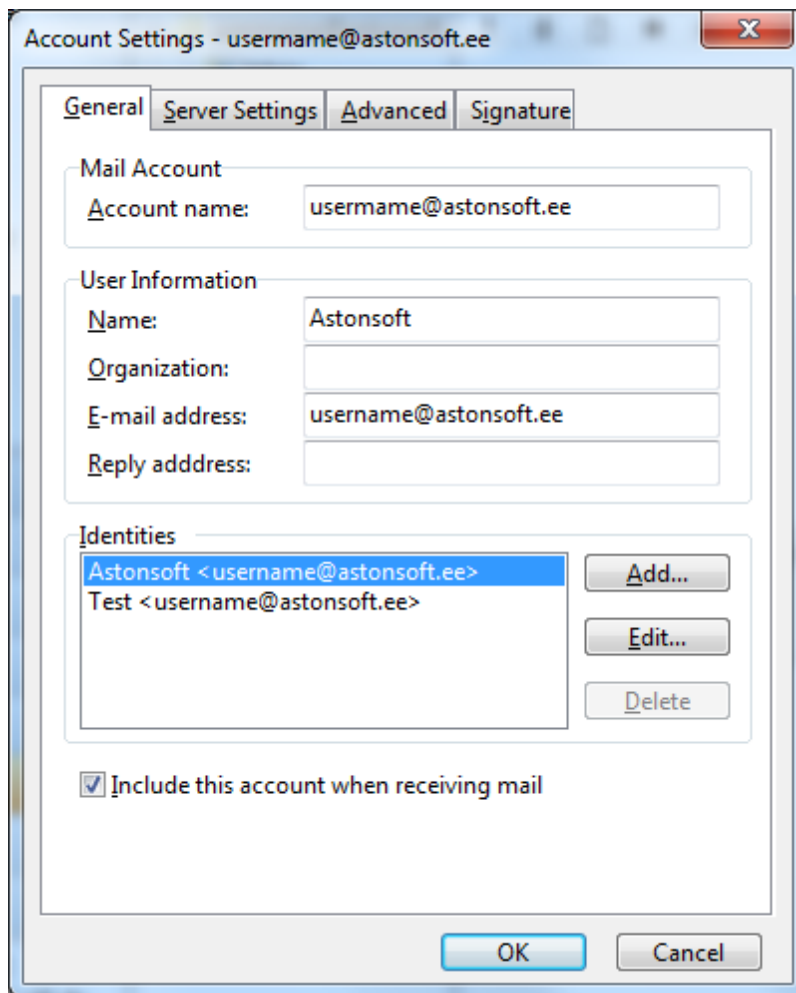
4.8.4 Account settings

Account settings are available from **Tools -> Account Settings** menu.



Select an account and press **Edit** button. This will open **Account Settings** dialog which consists of four tabs.

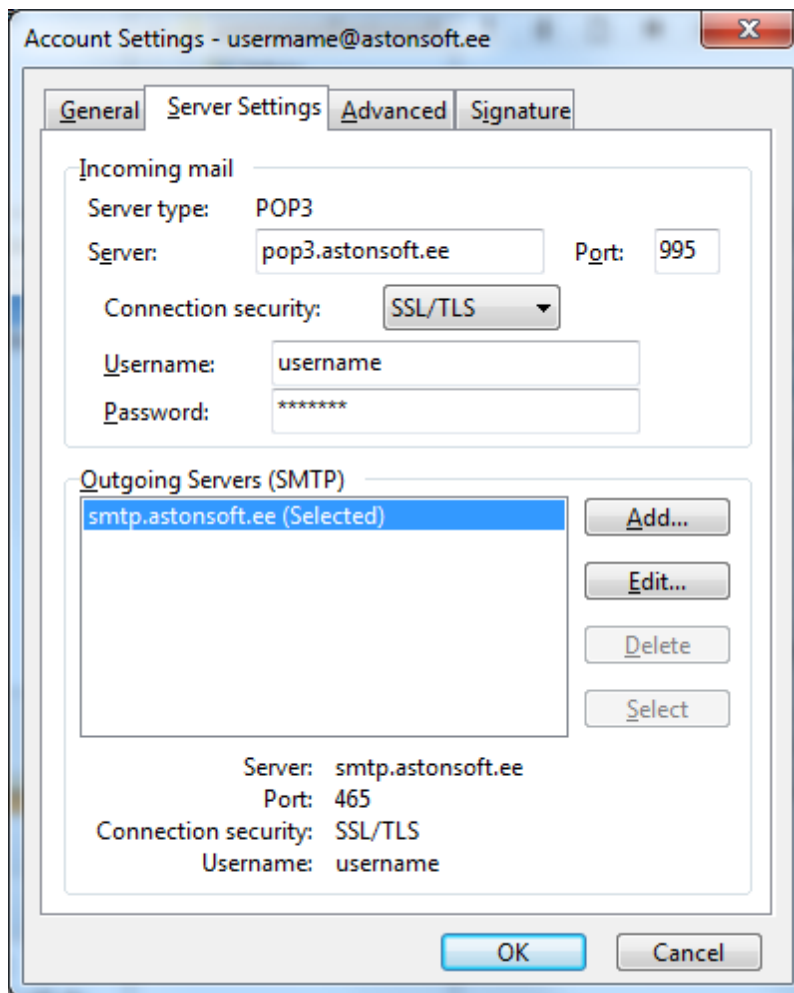
General tab allows to set account name and basic user info:



Identities allows to add optional sender data and signature. This identities list became available as drop-down menu when composing new mail.

Include this account when receiving all mail - includes/excludes account from Send/Receive process when pressing **Send/Receive** button from Actions bar.

Serve Settings tab contains server addresses and login info for incoming and outgoing mail. Refer to your mail provider help area if you are not sure what to enter here:



Outgoing servers section allows to add optional SMTP servers to account and choose which one will be used.

Default ports for incoming server:

POP3 - 110, 995 (SSL)

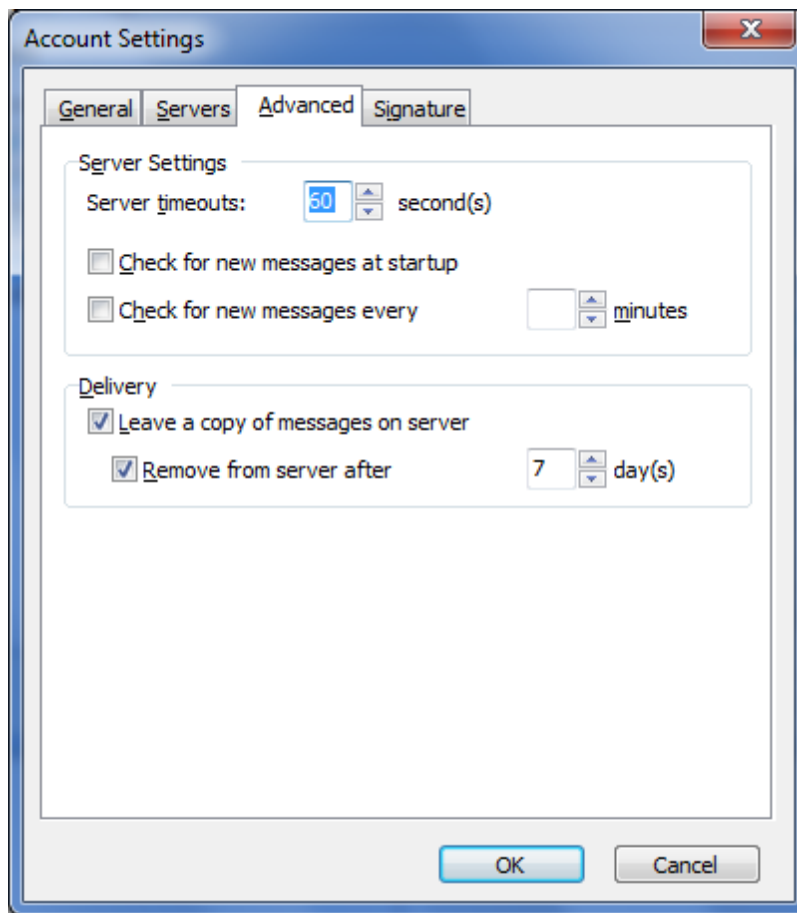
IMAP - 143, 993 (SSL)

Default ports for outgoing server:

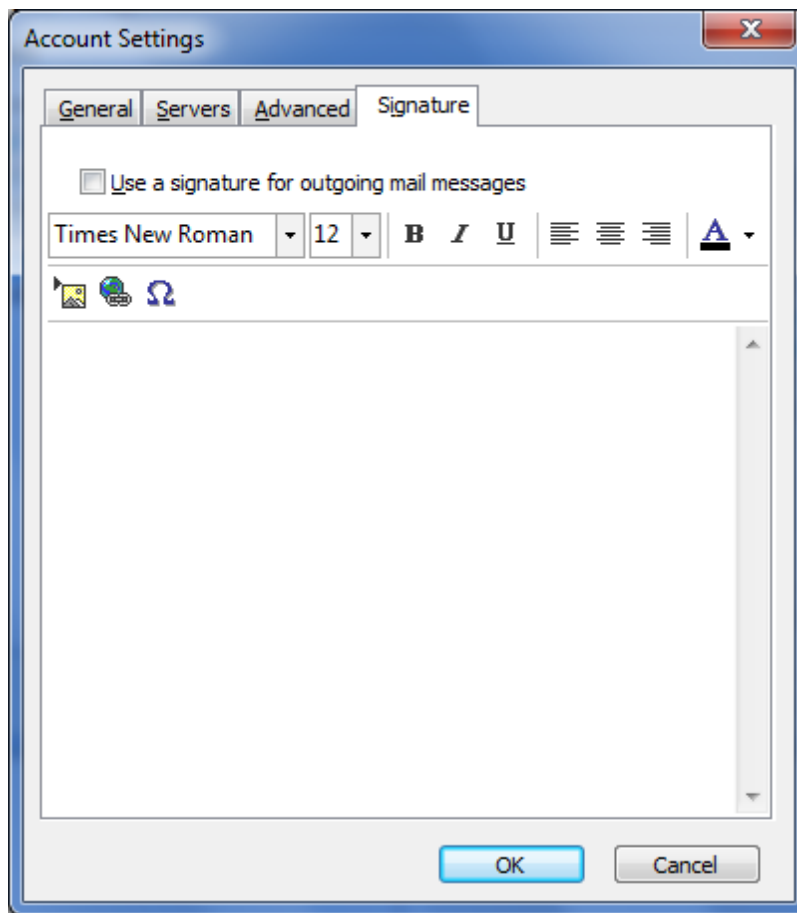
w/o SSL - 25, 2525

SSL - 465, 587

Advanced tab allows to set additional interaction with the mail server options



Signature tab represents a small text editor which allows to compose different kind of signatures:

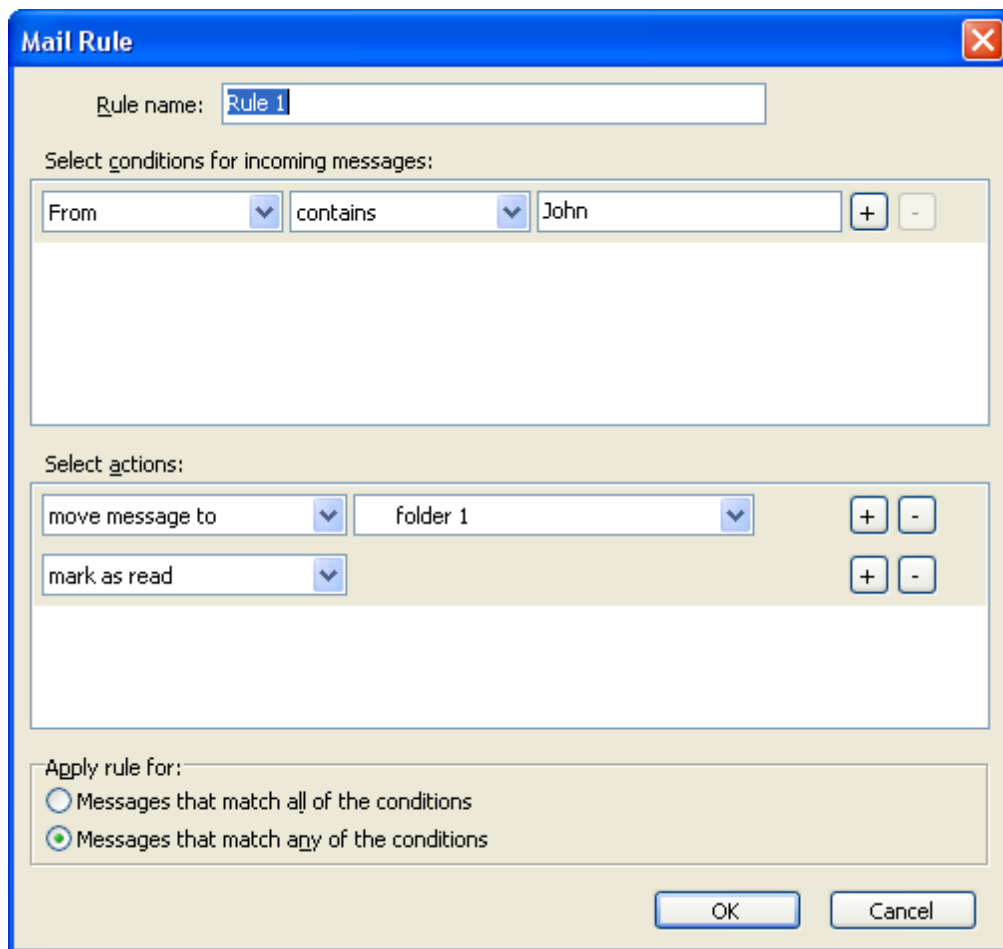


4.8.5 Message rules

EssentialPIM Pro allows to sort incoming mail automatically by using **Message rules**. Click on the **Tools** menu and select **Message Rules** option. This will open the dialog which allows to **Add**, **Delete** or **Edit** rules.



Press **Add** button to create a rule. This will open **Mail Rule** dialog which consists of two parts. Top part contains conditions, you may add or remove them using **+/-** buttons. Bottom part contain the actions list what to do with a message if the condition part is true. The given rule example will move message to folder "folder 1" and mark it as Read if From field will contain text "John".



The image shows a 'Mail Rule' dialog box with a blue title bar and a close button. It contains three main sections: 'Rule name', 'Select conditions for incoming messages', and 'Select actions'. The 'Rule name' field is set to 'Rule 1'. The 'Select conditions' section has one condition: 'From' contains 'John'. The 'Select actions' section has two actions: 'move message to' 'folder 1' and 'mark as read'. At the bottom, there are two radio buttons for 'Apply rule for': 'Messages that match all of the conditions' (unselected) and 'Messages that match any of the conditions' (selected). 'OK' and 'Cancel' buttons are at the bottom right.

Mail Rule

Rule name: Rule 1

Select conditions for incoming messages:

From contains John

Select actions:

move message to folder 1

mark as read

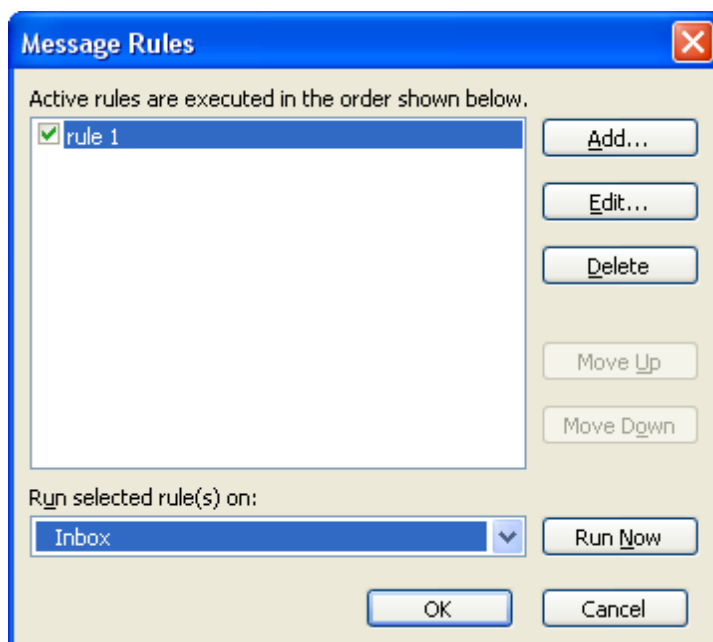
Apply rule for:

☐ Messages that match all of the conditions

☒ Messages that match any of the conditions

OK Cancel

Using **Run selected rule(s) on** dropdown menu allows to sort mail in already existing folder.



4.9 Import/Export data

4.9.1 Exporting

EssentialPIM Pro offers a large variety of formats to export your existing data. Export options are at **File -> Export ->**

All data can be exported one-by one, or you can select multiple entries using CTRL + mouse (for contacts and Notes), or All entries can be exported. In most cases you can even select which fields to export.

Contacts could be exported to:

- Windows Address Book (*.WAB, can be opened by double-clicking on it in Windows, also used by MS Outlook Express)
- Comma Separated Values (*.CSV, can be opened by MS Excel or Text Editor)
- HTML (*.HTML, can be opened by any Internet Browser)
- Rich Text Format (.RTF, can be opened by many Text Editors)
- Text Files (*.TXT, can be opened by any Text Editor)
- vCards (*.VCF, a file format standard for personal data interchange, specifically electronic business cards)

Notes could be exported to:

- HTML (*.HTML, can be opened by any Internet Browser)
- Rich Text Format (.RTF, can be opened by many Text Editors)
- Text Files (*.TXT, can be opened by any Text Editor)
- iPod

To Do list could be exported to:

- HTML (*.HTML, can be opened by any Internet Browser)
- iCal (*.ICS, a standard for calendar data exchange)
- CSV
- iPOD

Calendars could be exported to:

- HTML
- iCal
- CSV
- iPOD

Mail could be exported to:

- EML

Password entries could be exported to:

- CSV

4.9.2 Importing

EssentialPIM Pro makes your transition from other PIM easy.

You can import:

- Calendars, Contacts and Notes from MS Outlook
- Calendars and To Do lists from iCal files
- Notes from RTF/TXT, KeyNote, and TreePad files
- Contacts from Windows Address Book (WAB), CSV, vCard
- Passwords entries from CSV, Roboform (HTML), KeyPass (XML)
- Mail from EML files

4.10 Synchronizations

4.10.1 Add new synchronization

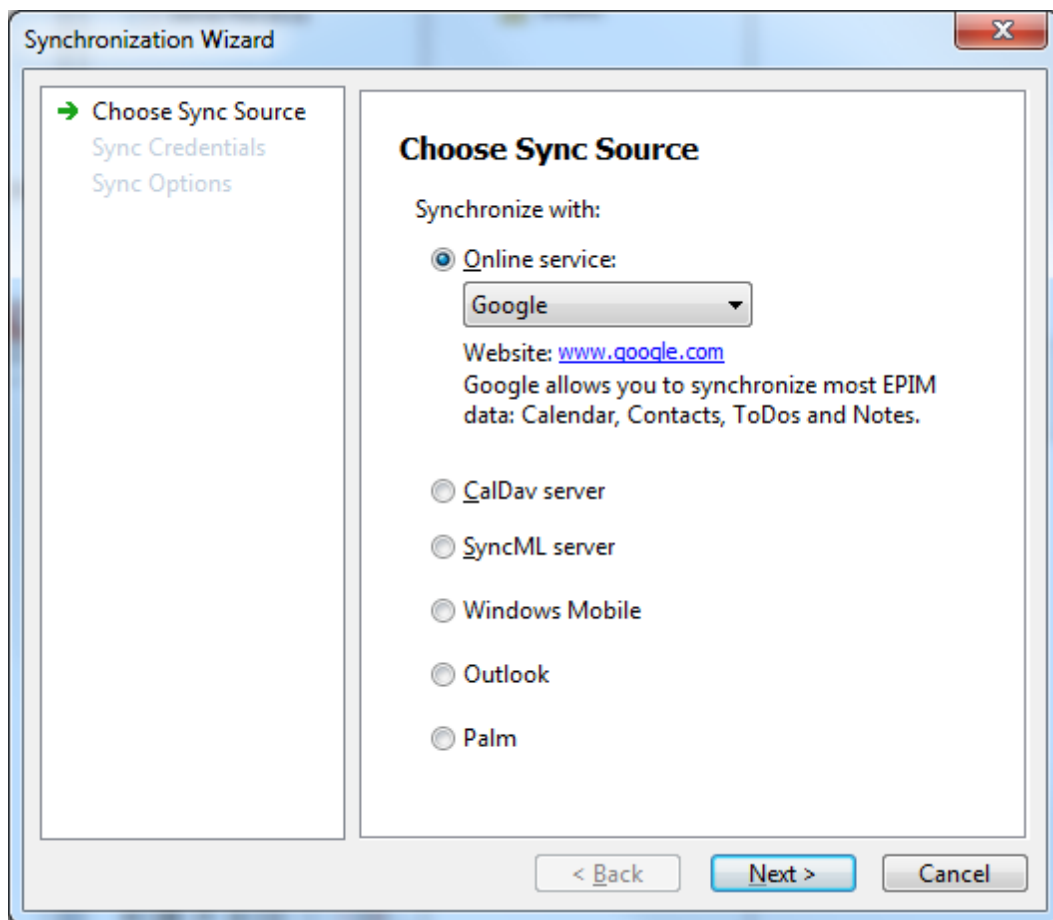
EssentialPIM Pro supports synchronization with:

- Google
- Yahoo
- OneMediaHub (by myFUNAMBOL)
- AOLSync
- GooSync
- Toodledo
- Memotoo

- Stylite/Egroupware
- HighRiseHQ
- SyncML servers
- CalDAV servers
- Android OS
- iOS
- Windows Mobile
- Outlook
- Palm

Run a **Wizard** under **File -> Synchronization** menu to add preferred synchronization type.

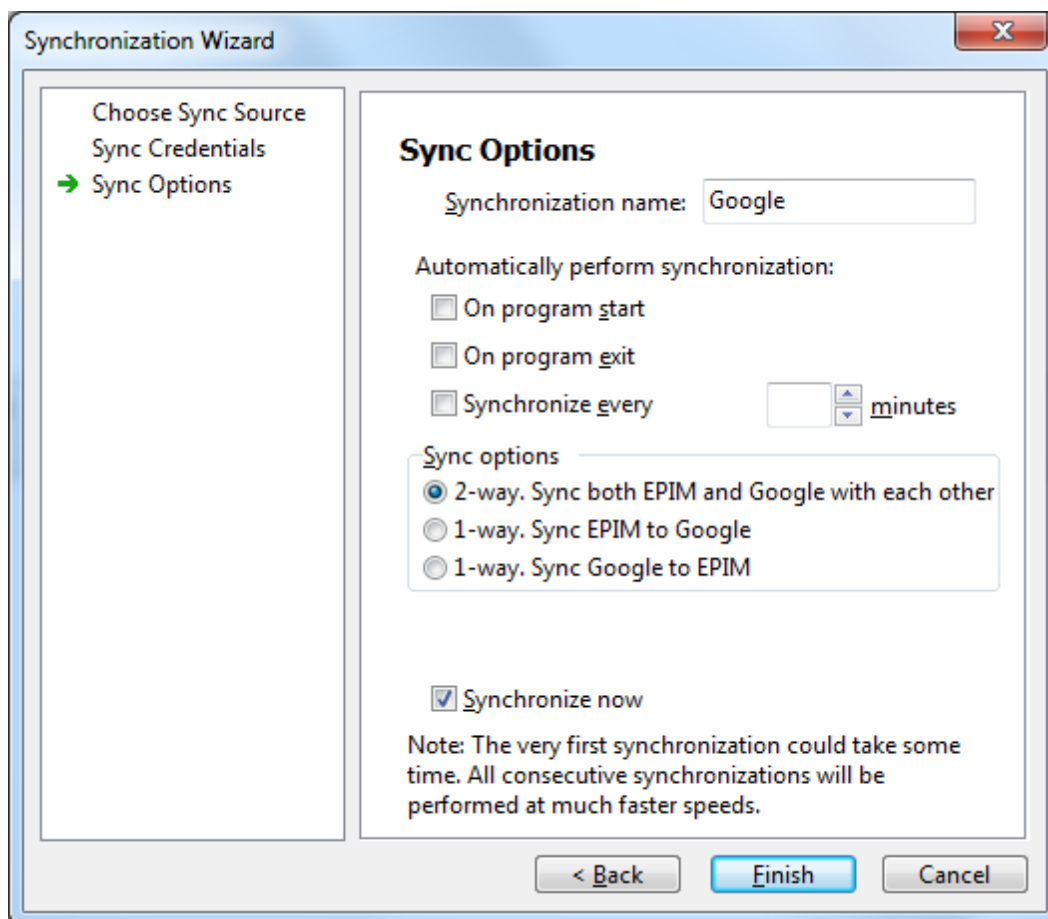
Step 1. Choose a service you want to synchronize with.



Step 2. Enter login data and choose what data to sync. Note, different synchronization types may not support synchronization of all EPIM modules.

The screenshot shows a 'Synchronization Wizard' window. On the left, a sidebar lists three steps: 'Choose Sync Source', 'Sync Credentials' (which is highlighted with a green arrow), and 'Sync Options'. The main area of the window is titled 'Sync Credentials'. It contains two input fields: 'Login:' and 'Password:'. Below these fields, there is a section titled 'Synchronize the following modules:' followed by four checked checkboxes: 'Calendar (with Google Calendar)', 'To Do (with Google Tasks)', 'Notes (with Google Docs)', and 'Contacts (with Google Contacts)'. At the bottom of the window, there are three buttons: '< Back', 'Next >' (which is highlighted with a blue border), and 'Cancel'.

Step 3. Name synchronization and choose sync options (options could differ for other synchronization types). Note, you can have several synchronizations with the same service.



You will be able to manually execute created synchronizations by clicking on **File -> Synchronization**. Settings for all synchronizations can always be altered in **Tools -> Options**. It is also possible to delete outdated synchronizations from the Options dialog window.

4.10.2 Android

EssentialPIM is capable of synchronizing with Android devices. You need to download and install free Android version of EssentialPIM onto your device [Google Play Link]. You will be able to synchronize and manage data from the following modules:

Windows EssentialPIM		Android EssentialPIM
Calendar	<->	Calendar (Android built-in)
To Do	<->	To Do
Notes	<->	Notes
Contacts	<->	Contacts (Android built-in)
Passwords	<->	Passwords

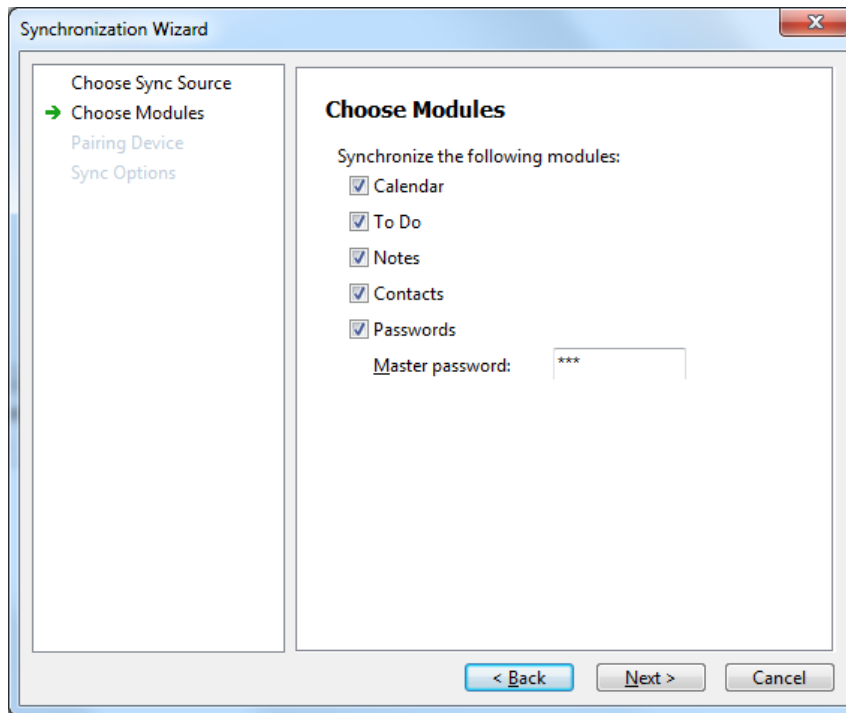
Pre-requisites for synchronization

- Device running Android 2.1 or newer version
- Common network between Android device and PC. This is usual that your PC and Android connect to the same router (Android device uses Wi-Fi, while PC uses Wi-Fi)

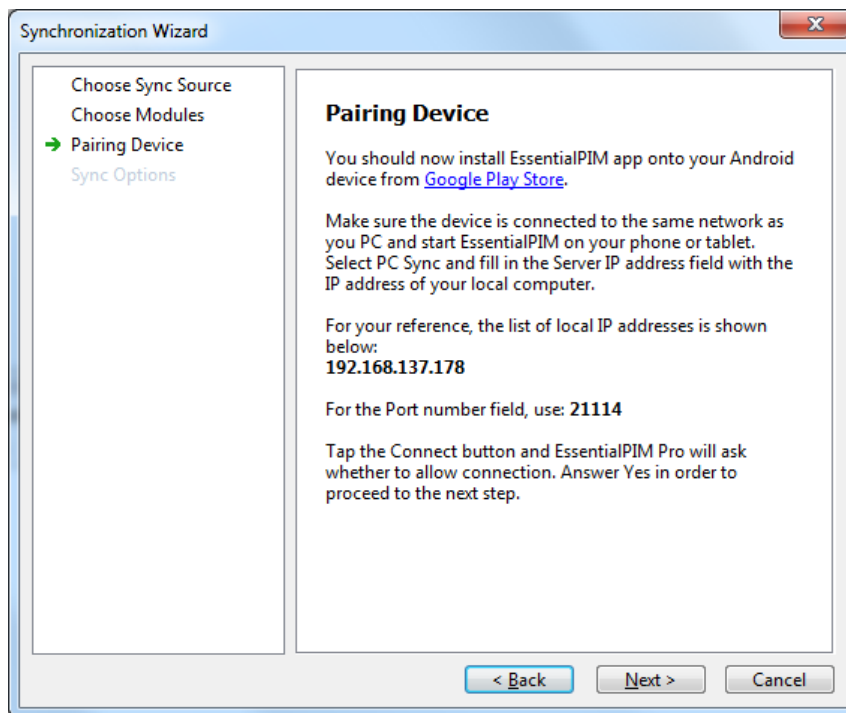
or cable)

Setting up and running synchronizations

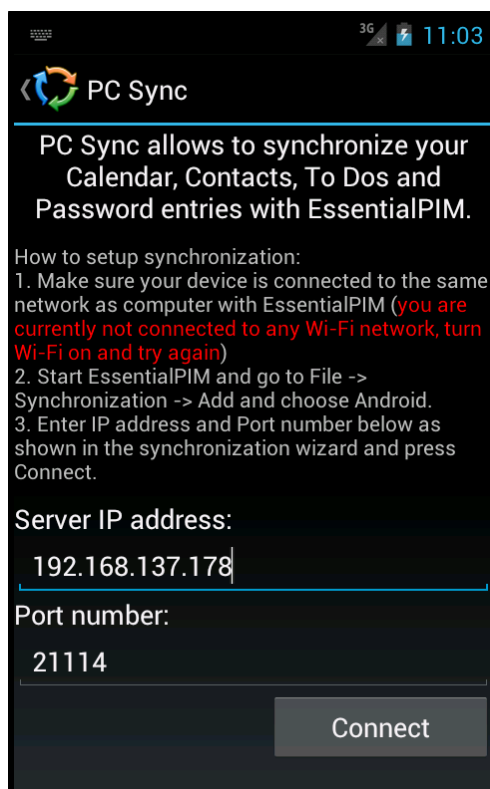
To set up synchronization for the first time, click on **File -> Synchronization -> Add Synchronization -> Android**.



Choose modules to synchronize and enter password for **Passwords** module (you may need to run EssentialPIM on Android first and set up master password by tapping the Passwords icon). Once you finish, press **Next**.

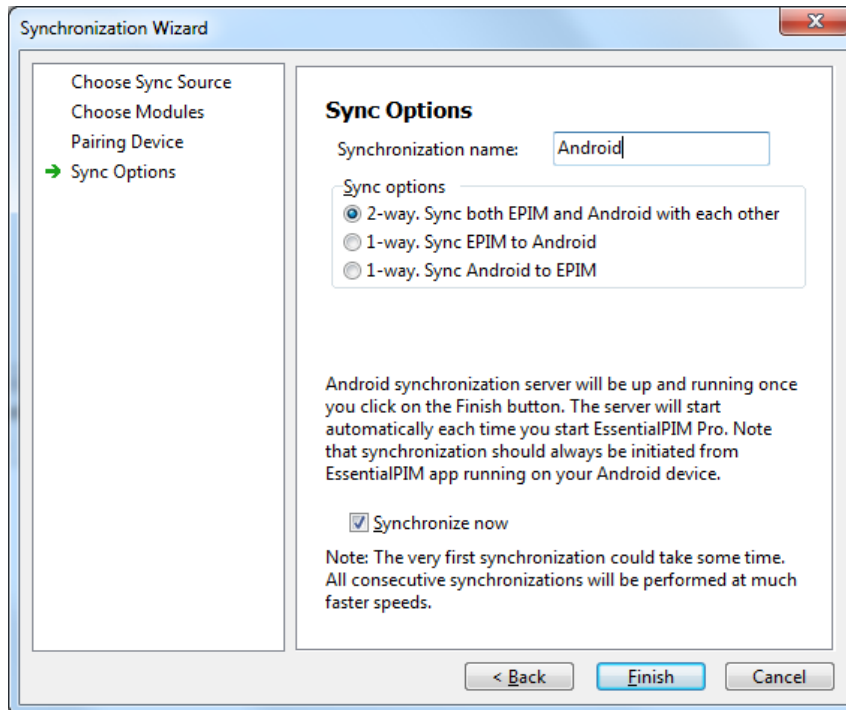


Now run EssentialPIM on an Android device and choose PC Sync option.



Enter **Server IP address** and **Port number** provided by the synchronization wizard and press **Connect** button. EssentialPIM will detect your device and in order to

prevent any unauthorized synchronization attempts with different devices in the future, will ask whether to allow synchronization with your particular device. On the last step you'll be able to change synchronization name and choose synchronization direction.



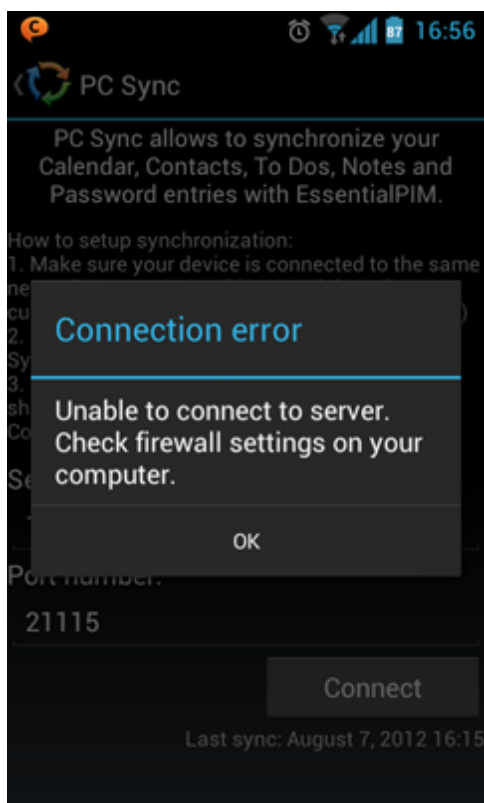
On subsequent synchronizations, to start synchronizing, you need to:

- Start Windows version of EssentialPIM
- Start Android version of EssentialPIM, go to PC Sync and tap Connect

If something does not work, see [Troubleshooting Android Synchronization](#).

4.10.2.1 Troubleshooting

If after tapping the Connect button you see the following connection error message:



Make sure:

- You have read Setting up Android synchronization
- You use the latest Windows EssentialPIM version (check Help-> Check For New version)
- Windows EssentialPIM is on the Pairing Device step in the synchronization Wizard (if not paired previously. If paired, Windows EssentialPIM needs to be running without Wizard)
- You use common network between Android device and PC (same network)
- Firewall allows connections over port 21114 (default), or change the port number in PC EssentialPIM Wizard
- If you are sure all of this is done, but still no go, please email support with screenshots of your Windows and Android versions of EssentialPIM

4.10.3 iOS EPIM (iPhone/iPad/iPod Touch)

EssentialPIM is capable of synchronizing with iOS devices. You need to download and install free iOS version of EssentialPIM onto your device from App Store. You will be able to synchronize and manage following data:

Windows EssentialPIM

Calendar	<->
Contacts	<->
To Do	<->
Passwords	<->

iOS EssentialPIM

Calendar (iOS built-in)
Contacts (iOS built-in)
To Do (inside iOS EPIM)
Passwords (inside iOS EPIM)

Pre-requisites for synchronization

- Devices supported: iPhones 3GS and newer, all iPads, iPod 3 and newer (provided iOS 5 or newer is installed)
- iTunes is installed on PC
- Common Network between iOS device and PC. This is usual that your PC and iOS connect to the same router (iOS device uses Wi Fi, while PC uses Wi Fi or cable)

Setting up iOS EPIM synchronization

1. On **Windows EPIM**, click on **File -> Synchronization -> Add Synchronization -> iPhone/iPad**.

A wizard will start that will guide you through setting up a synchronization. This is a one-time process, after this you will need only start synchronizations from your device.

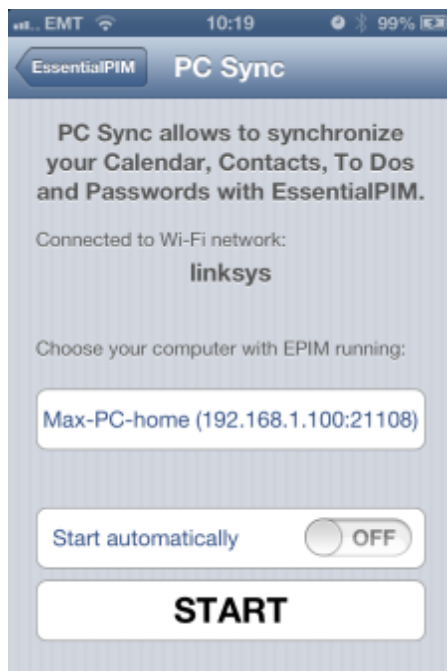
2. On **"Sync Credentials"** step, choose modules to synchronize.

3. On next, **"Pairing Device"** step, you should search for "EssentialPIM" on App Store on your device and install it.

Tip: Make sure your iPhone/iPad Wi Fi is connected to the same network as your Windows computer.

4. After you run **EssentialPIM on your iPhone/iPad**, choose **"PC Sync"** menu.

You should see this screen (press Start):



Tip: If you do not see "Start" button, make sure your Windows EPIM is now on **"Pairing Device"** step and you have iTunes installed on Windows!

5. At the same time, **EssentialPIM on Windows** will ask for confirmation:



This is needed to prevent any unauthorized synchronization attempts with different devices in the future.

6. Next, "Sync Options" step presents you with some Options. Default Options are usually OK.

On subsequent synchronizations, to start synchronizing, you need to:

- start Windows EPIM
- start iOS EPIM, go to "PC Sync" and press "Start"

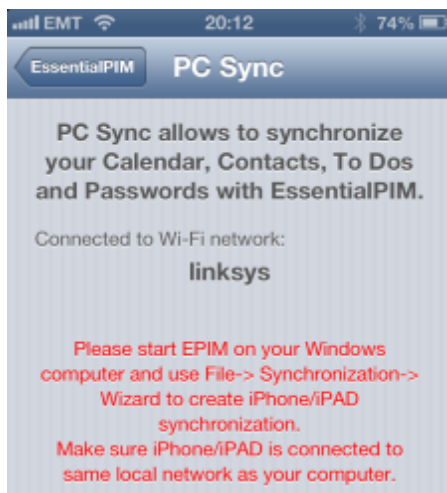
If something does not work, see Troubleshooting iOS Synchronization

More details on synchronization

For each EssentialPIM category on Windows, a separate Calendar will be created on iPhone/iPad (to change this go to **Tools-> Options-> Your synchronization** and uncheck "**Create calendars in iPhone for each of EPIM categories**". In this case all EPIM categories will be synchronized to one default calendar on your iPhone/iPad).

4.10.3.1 Troubleshooting iOS Synchronization

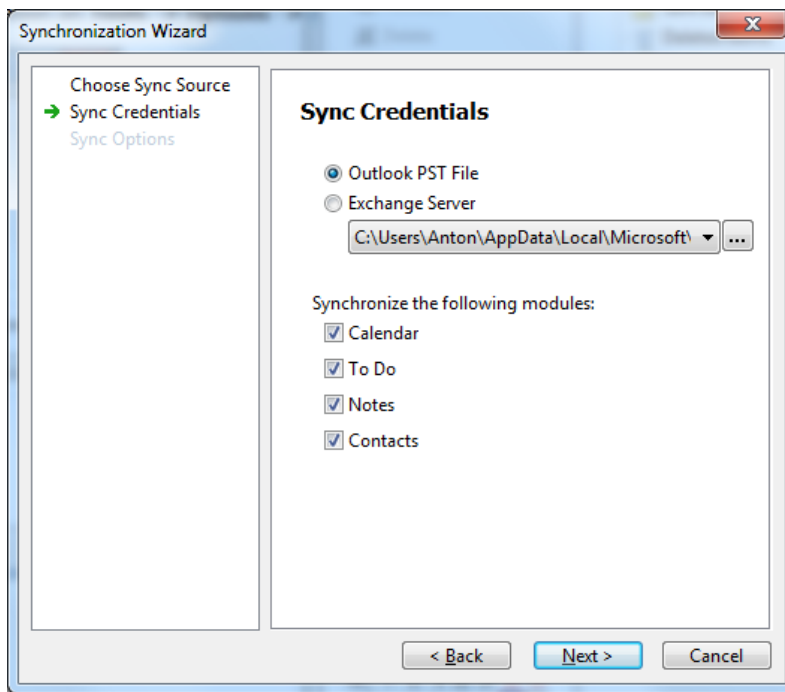
If you want to start synchronization, but instead see this screen on iOS EPIM:

**Make sure:**

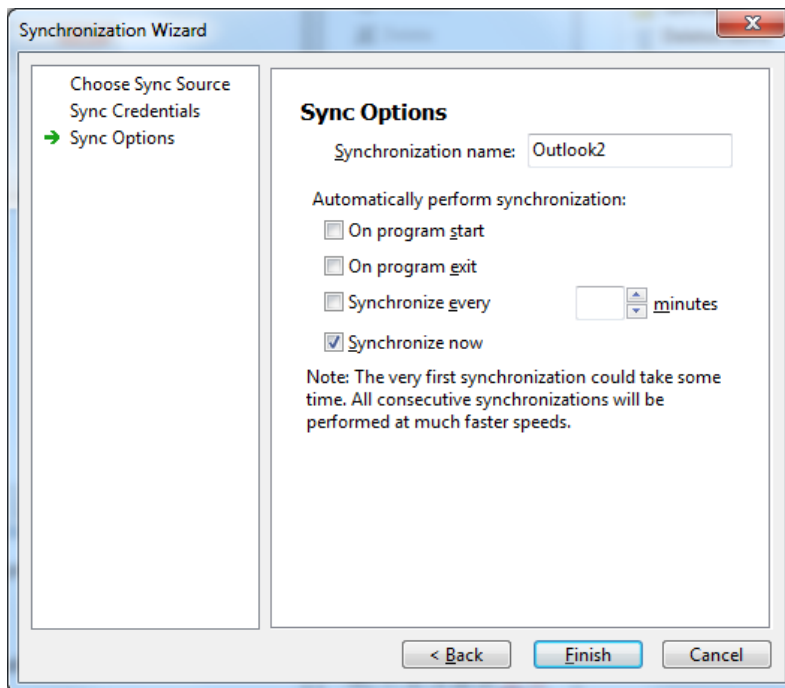
- You have read "Setting up iOS EPIM synchronization"
- iTunes is installed on PC
- You use the latest Windows EPIM version (check Help-> Check For New version)
- **Windows EssentialPIM** is on "**Pairing Device**" step (if not paired previously. If paired, Windows EPIM needs to be running without Wizard)
- You use Common Network between iOS device and PC (same network)
- Firewall allows connections over port 21108 (default), or change it in PC EPIM Wizard
- If you are sure all of this is done, but still no go, please email support with screenshots of Windows EPIM and iOS EPIM.

4.10.4 Outlook

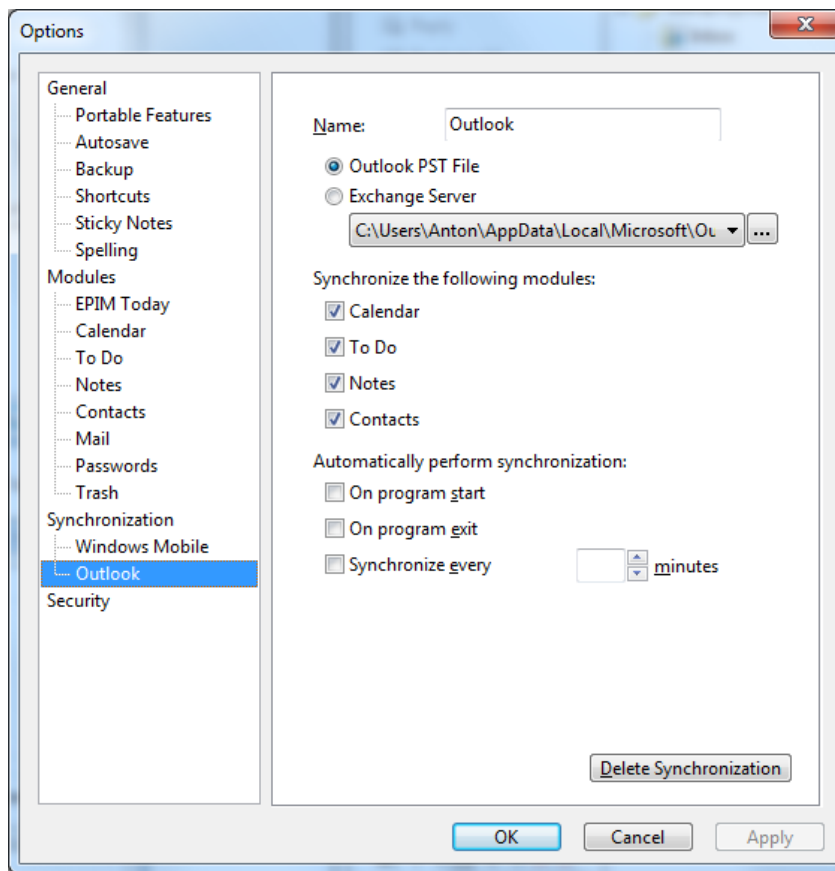
EssentialPIM is capable of synchronizing with Microsoft Outlook. Each EssentialPIM module will be synchronized to a corresponding module in Outlook. To synchronize with Outlook, first add a synchronization under **File -> Synchronization -> Add Synchronization -> Outlook**.



Pressing **Next** button allows to choose how to synchronize - automatically or manually:



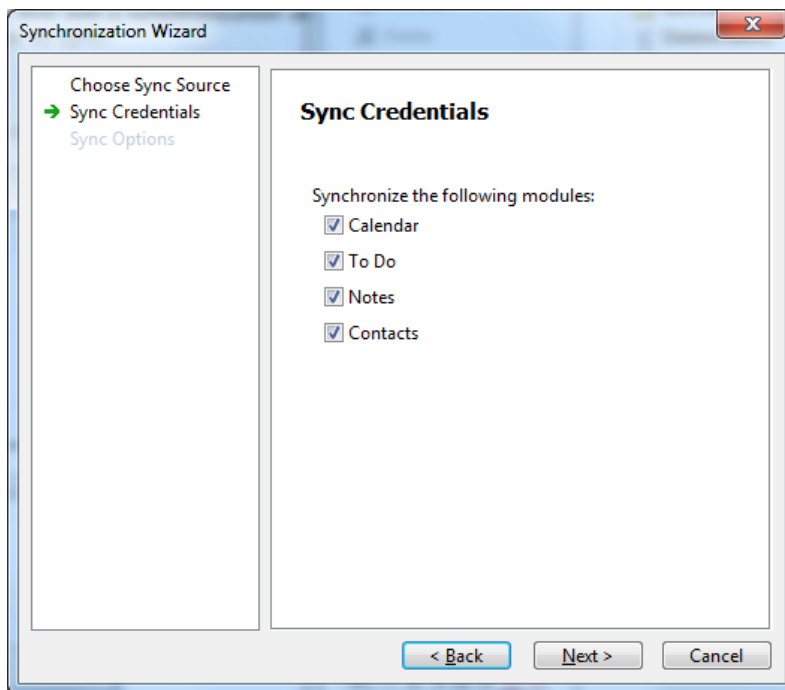
All Outlook synchronization settings could be accessed via **Tools -> Options** menu.



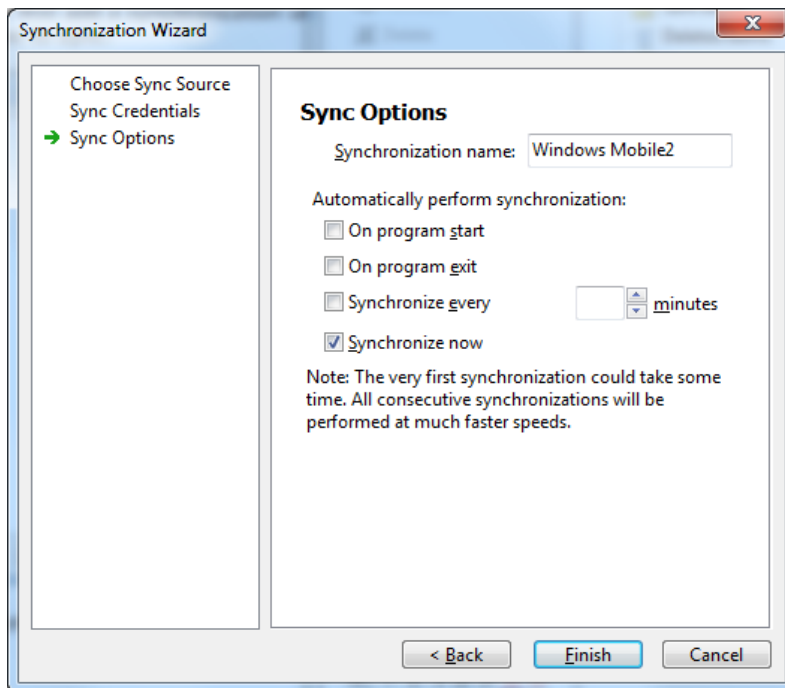
4.10.5 Windows Mobile

EssentialPIM is capable of synchronizing with Windows for Mobile devices. Each EssentialPIM module will be synchronized to a corresponding module in your pocket device.

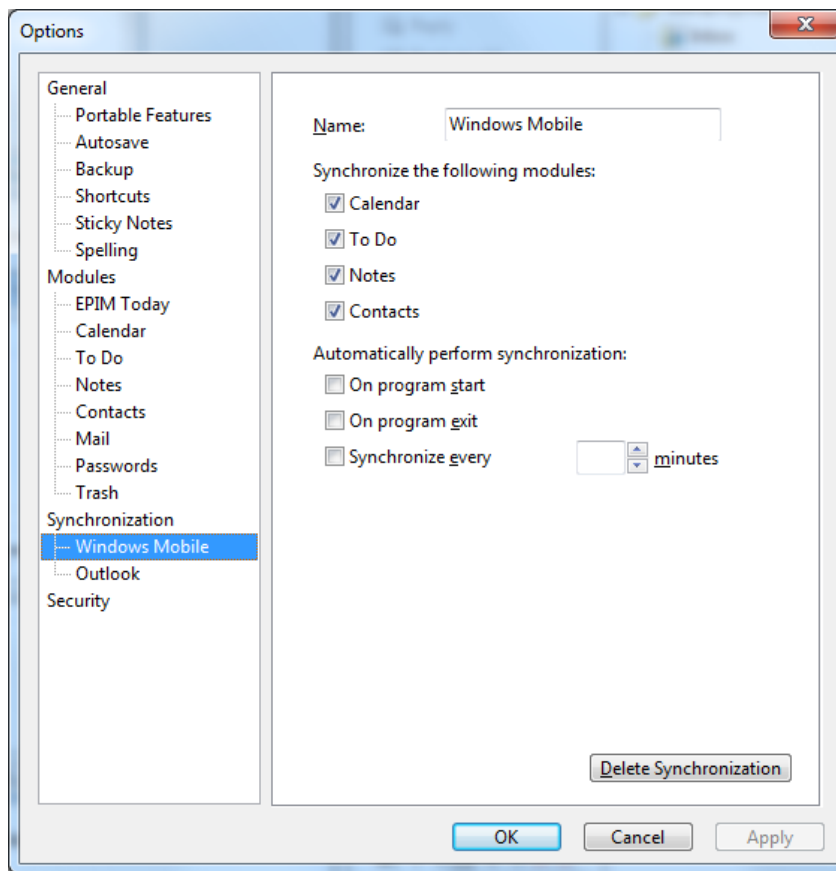
To Synchronize with a device running WinMobile, first add a synchronization under **File -> Synchronization -> Add Synchronization -> Windows Mobile**.



Pressing **Next** button allows to choose how to synchronize - automatically or manually:



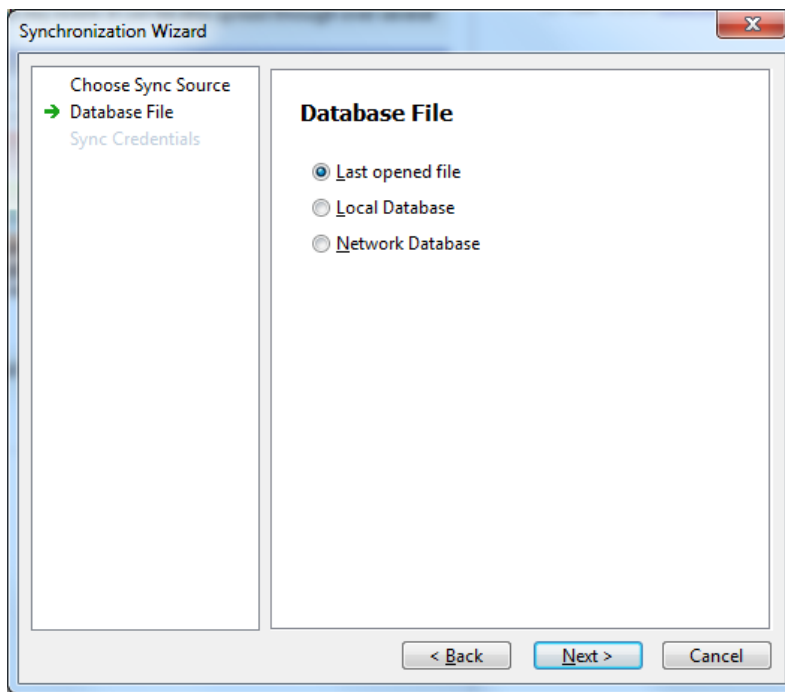
All Windows Mobile synchronization settings could be changed under **Tools -> Options** menu.



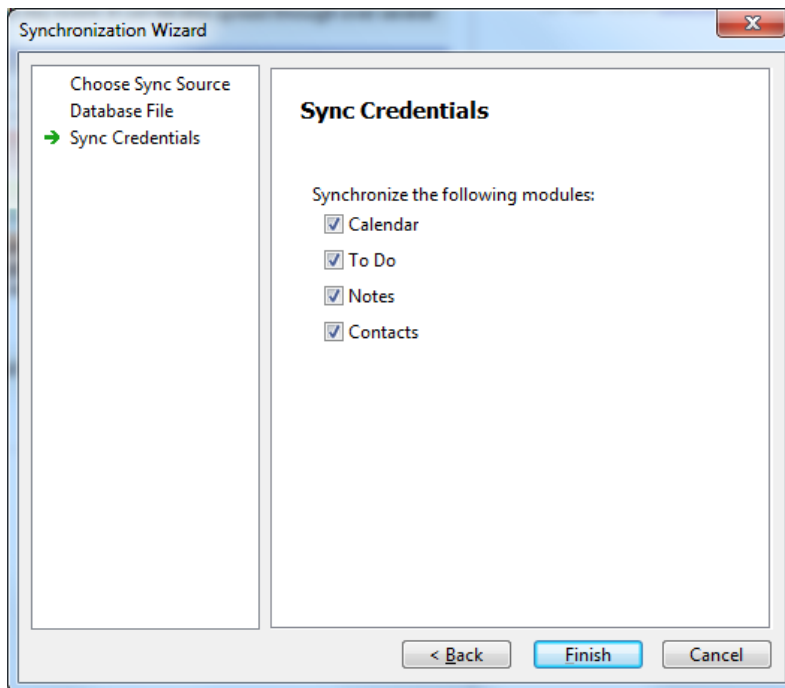
4.10.6 Palm

EssentialPIM is capable of synchronizing its data with Palm devices. Each EssentialPIM module will be synchronized to corresponding module in Palm device.

Add synchronization with Palm under **File -> Synchronization -> Add Synchronization -> Palm**.



Pressing **Next** button allows to choose modules to synchronize:



To start synchronization close EPIM and run HotSync on your Palm.

All Palm synchronization options can be changed under **Tools -> Options** dialog.

4.11 Networking

EssentialPIM Pro has extensive Network features built in.

It allows you to connect to any EPIM database from any other machine, with only 2 conditions:

- EPIM database should be on the computer which has EPIM Server installed
- You can access this computer via LAN, Internet or WAN

To use Networking, you need to purchase Network Licenses, amount should equal to a number of computers you want EPIM to install on. After you insert a Network License into EPIM (Help-> Register) you will be able to connect to a Server from this EPIM Copy.

EssentialPIM Server is a free utility which can be downloaded as [Network Package](#).

4.11.1 Connecting to a server

Quick start for Networking Features:

To use Networking you will need 2 components:

- **Server**
- **EssentialPIM Pro Client**

Server is essentially a Firebird Server. It is a part of Network package and if you have chosen to install it, you can now see it in Windows Start menu (**Programs -> Firebird -> Firebird Server**). Most probably it is already running on your computer (look for fbserver.exe running as a process)

If it is running already, no further steps need to be taken in regards to Server component.

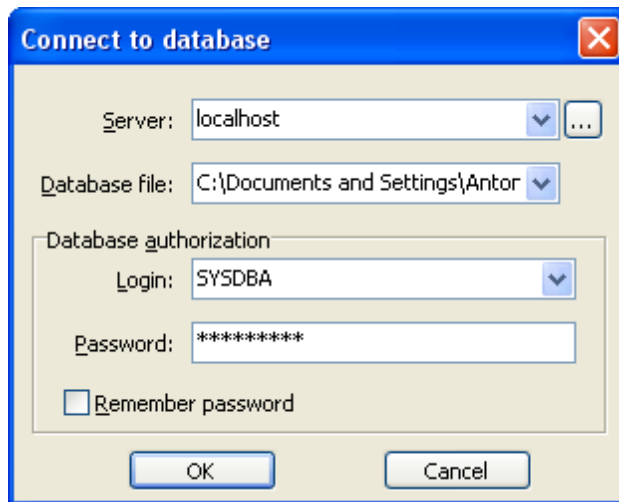
Now let's setup a **EssentialPIM Client** (which is actually any copy of EPIM 2.x). You can connect to Firebird server virtually from anywhere, LAN, VPN, Internet. You just need to know:

- **IP Address of the machine** (or Name, if connecting within LAN)
- **Name and Path to the database** on a Server

Let's connect to a test database on a local computer:

- Start EssentialPIM
- Close any open database (**File -> Close**)
- Go to **File -> Connect to Database** (If window is disabled)

You will see this window:



Fill in fields as shown. In **Database file** browse to EPIM test file which is at C:\Documents and Settings\YOUR USERNAME\Application Data\EssentialPIM Pro\Network\network_test.epim
Username for Administrator is **SYSDBA** and default password is **masterkey**

Important: database should be on the same machine as the Firebird server. EssentialPIM does not use file sharing, so don't use shared or network paths. Always use absolute path to the database, like: G:\database.epim

Now you will connect to a test database through EssentialPIM Server.

Attention firewall users!

Following ports need to be open to allow EssentialPIM Clients to communicate to the server:

- on Server machine for fbserver.exe:
 - incoming: 3050 (for data) and 3051 (for events)
 - outgoing : whole range (fbserver uses random range of ports to communicate events)
- on Client machine for EssentialPIM.exe:
 - incoming: whole range
 - outgoing: 3050 and 3051

You can manage users using **Tools -> User** menu (read more)

We have pre-made several users with non-administrator access level, they are:

Login	Password
USER1	epim456
USER2	epim765

In folder C:\Documents and Settings\YOUR USERNAME\Application Data\EssentialPIM Pro\Network\ we have also pre-made a database.ini file that you can place on other computers (into C:\Documents and Settings\YOUR USERNAME\Application Data\EssentialPIM Pro\) and EPIM will automatically connect to this test database.

Note: since we use computer name to address the machine, it will work within LAN only.

Read more about managing users

4.11.2 Managing users

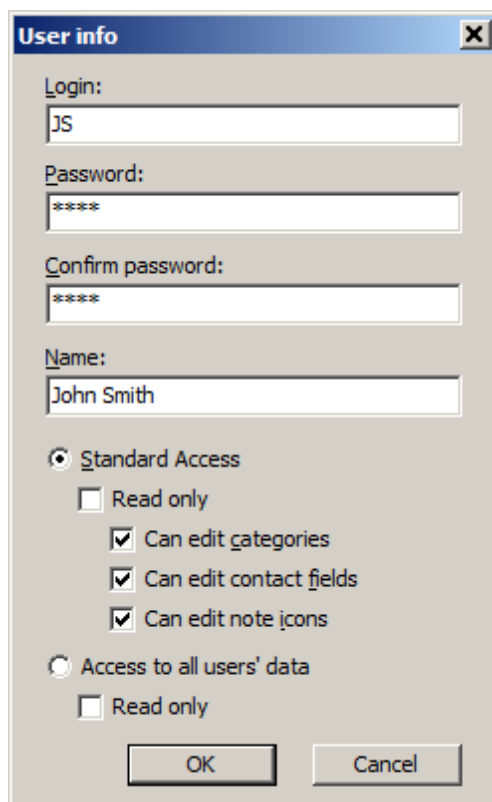
The default credentials for database administrator are as follows: login: SYSDBA, password: masterkey

After you login as an administrator, you will be able to access **Tools -> Users** menu. The menu allows you to create and disable users.

SYSDBA is a special user and can:

- create/edit users (includes assigning rights to change categories and fields in Contacts)
- create super-users (who will be able to see ALL items in database excluding emails, regardless of item settings)
- upgrade database to new version.

When you press "Add" in Users administration dialog, you will see this window:

A screenshot of a 'User info' dialog box. It has a title bar with 'User info' and a close button. The dialog contains several text input fields: 'Login:' with 'JS', 'Password:' with '****', 'Confirm password:' with '****', and 'Name:' with 'John Smith'. Below these are two radio button options. The first is 'Standard Access', which is selected, and it has three sub-checkboxes: 'Read only' (unchecked), 'Can edit categories' (checked), 'Can edit contact fields' (checked), and 'Can edit note icons' (checked). The second radio button is 'Access to all users' data', which is unselected, and it has a sub-checkbox 'Read only' (unchecked). At the bottom are 'OK' and 'Cancel' buttons.

Login and Password are to be user in File -> Connect EPIM dialog.

Name - that's an optional field. If filled in, this name will be displayed to other users

when they want to assign item to John. If this field is left blank, "JS" will be used.

Most users will be assigned a "Standard Access". Sometimes one user will give full read-write rights to items to other user. You can overrule that by checkin "Read Only". In this case John will only be able to read items assigned to him by other users (even if other users assign items to him). This is very convenient if you have for example a trainee in the house. You can assign items to him, but he will not be able to modify them.

"Access to all users' data" is a super-user's privilege. It means John will be able to see all items created by other users, even if they did not assign it to him. Exception is Mails.

You can limit his rights by "Read-only" attribute. This is convenient if you have for example an auditor in the house, who needs to see full database, but should not change it.

4.11.3 Assigning items

Each user of database (unless he/she is read-only user) can give rights to read/modify his/her items to other users.

You see from quick-selection menu we can choose **Public** - in this case item will be accessible by any user in the database, or **Private** (default status)- this item will be accessible only by creator (except SYSDBA and any super-users).

We can also limit access to this item by "Read-only" property.

If we want to assign access to this item to specific users, let's press the "..." button.

There you can select specific users, or select "All current and new users" - that's Public status.

4.11.4 Backing up

In Network environment, where users maybe actively working with a database, but no EssentialPIM copy is running on server machine, there can be a risk of not creating backups.

In such cases, we advice you to use one of multitude of free and commercial backup utilities for Firebird databases.

Below are links to get you started:

- <http://www.talatdogan.com/fibs.htm>
- <http://www.sqlly.com/download.html>
- <http://www.crypton.co.uk/freetools.html>

4.11.5 Network license

EssentialPIM Network license defines how many computers are allowed to connect to the database (at all, not concurrent users).

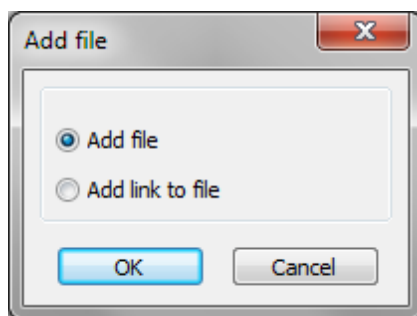
If you have purchased 5 licenses, you can install the key on 5 computers and those machines will be able to connect to EssentialPIM server.

EssentialPIM Server itself is free.

For more information please visit Buy page.

4.12 Working with attachments

EssentialPIM Pro can store links to any files or files themselves in its database. Each element, be it Appointment, Note, To Do or a Contact can store files, relevant to this element.



Choosing a **Add link to the file**, you preserve the database size, but if file is moved, link won't work.

Choosing **Add file**, you can be sure that the file won't get lost.

Attachments tab supports different views such as Large icons, Small icons and Details. You can choose preferred one from drop down menu in the bottom-right corner of the

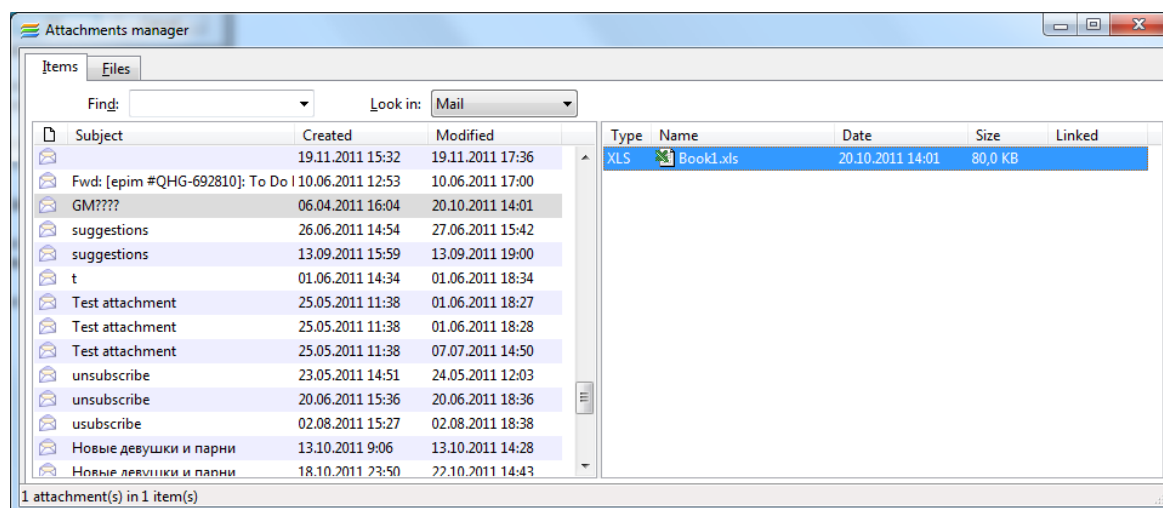
dialog. Details view allows to sort attachments by Name, Date and Size.

Attachments manager

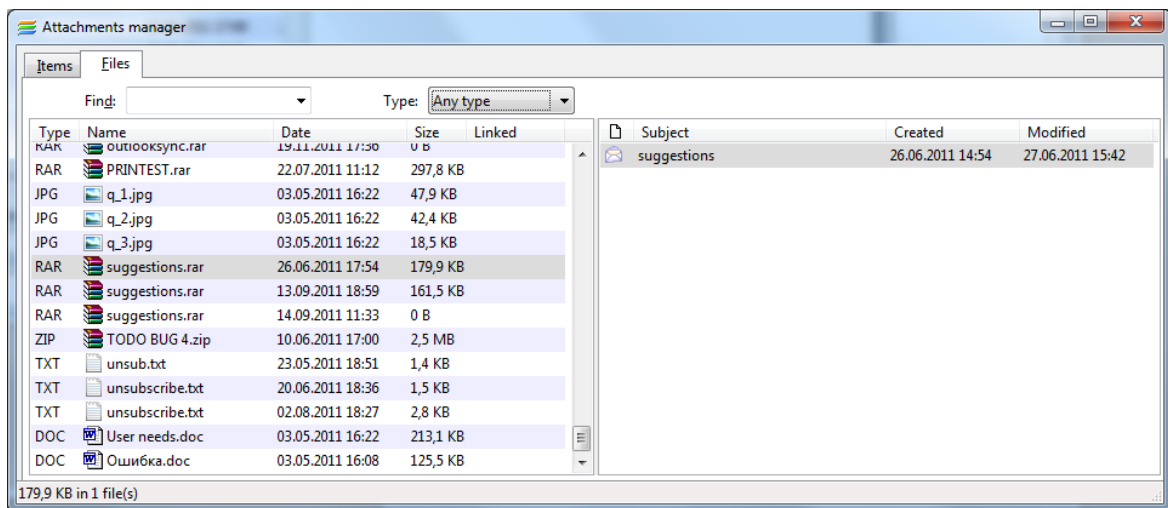
Attachments manager allows to work with either items or attachments throughout the whole database. It's also a handy tool to control your database size giving an easy way to delete unnecessary attachments. It's available under **Tools -> Attachments manager** or by pressing the **Attachments manager** button in any item's Attachments tab.

Attachments manager has two tabs:

1. **Items**. The tab shows all items that have attachments. You can search for an item here and manage its attachments. Right pane shows the list of attachments for the selected item. Here you can open, delete, add attachments or save them to a hard drive. All mentioned options are available from the right-click menu.

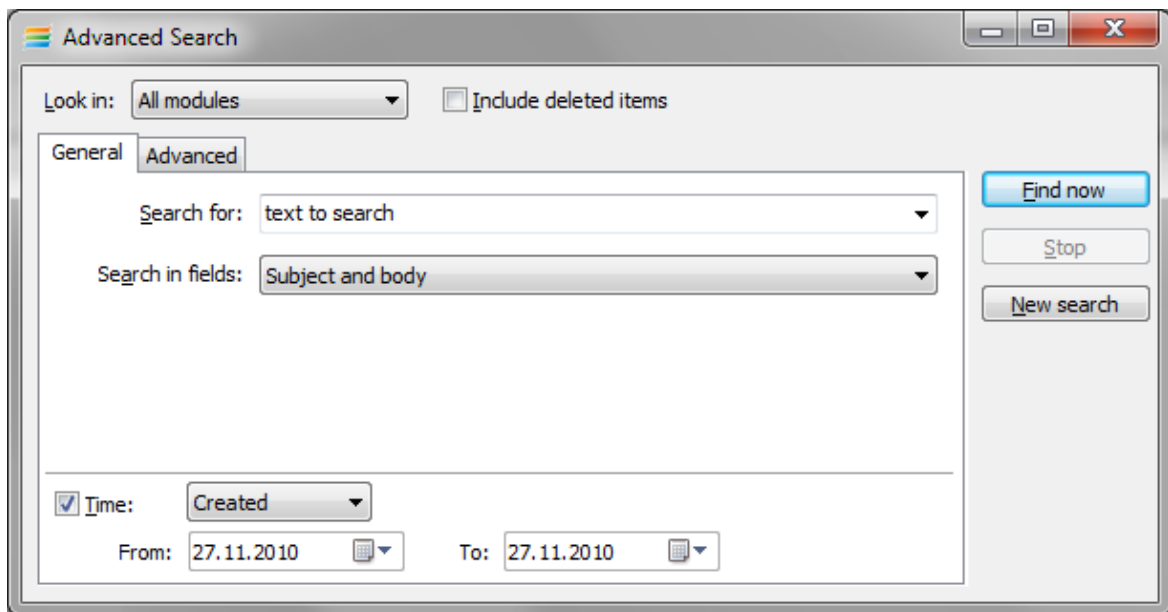


2. **Files** tab shows the items by their attachments. Left pane represents the list of all attachments in the database. Right pane shows items which selected attachment is linked to.



4.13 Advanced search

EssentialPIM Pro has a powerful searching tool built in. It allows to search items through the whole database file with various conditions. **Go to Tools -> Advanced search** or press **Ctrl+Alt+F** to call Advanced search dialog:



Look in drop-down menu allows to set module to search, **Include deleted items** option includes/excludes items located in trash.

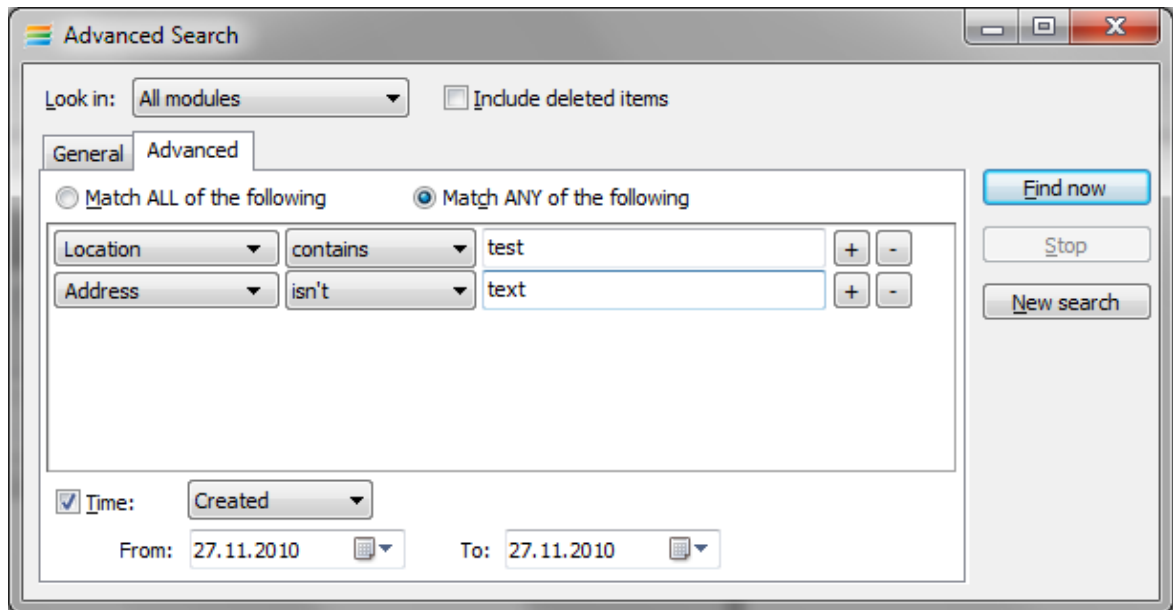
General and **Advanced** tabs allow to perform simplified or complex search tasks.

Time option can limit search period for items created or modified within the specified time frame.

Search under the **General** tab looks for the whole phrase typed into the **Search for** field. **Search in fields** drop-down list allows to narrow down the search area to

subject, body or attachments fields only.

Advanced tab allows to set more complex search criteria:



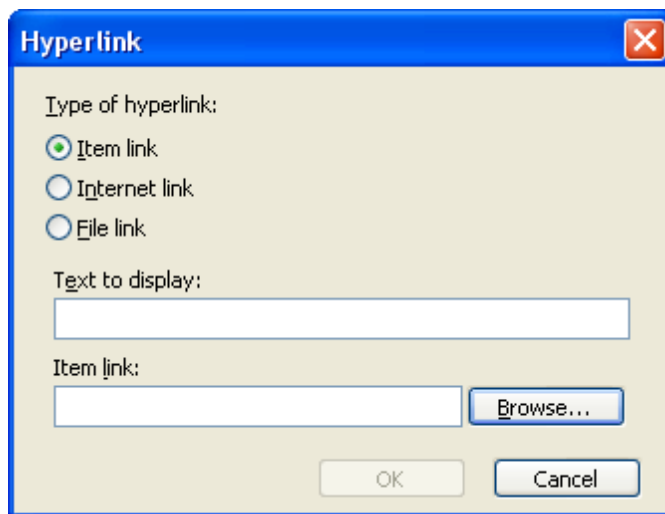
First, you select field for one of the modules and then you select which of the conditions (is / isn't / contains / doesn't contain) to utilize. Once set, click on the Find Now button.

4.14 Interlinking

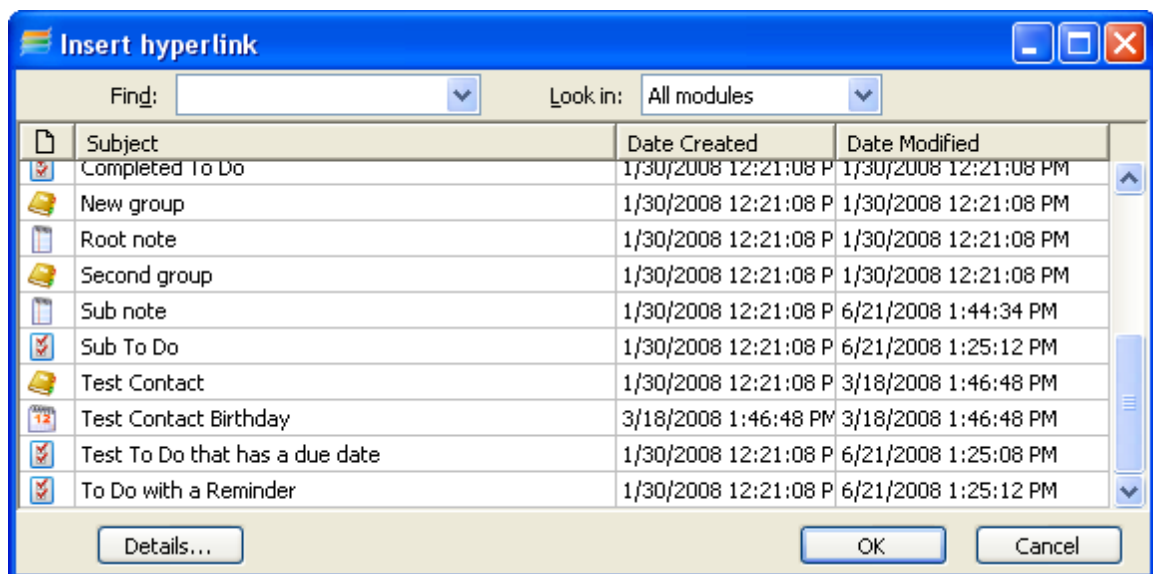
EssentialPIM Pro supports cross-linking between elements and global linking.

Cross-linking

To add a link to an EssentialPIM Pro item press **Insert Hyperlink** button.

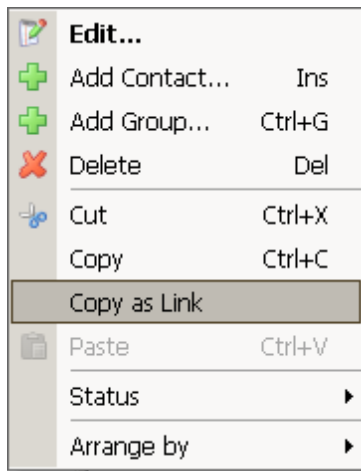


In pop-up **Hyperlink** dialog choose **Item link** option, enter text for a link and item path to link with by pressing **Browse** button:



Global linking

You can create a link to any EssentialPIM Pro item. Choose **Copy as Link** option from context menu:



It will copy link to a clipboard. Then it is possible to use this link in any application (i.e. paste it as icon path).

4.15 Shortcuts

EssentialPIM Pro makes extensive use of shortcuts. Here is the list of them:

Global:

Ctrl+Alt+S Minimize to system tray
 Shift+Ctrl+T New Appointment
 Shift+Ctrl+O New To Do
 Shift+Ctrl+N New Note
 Shift+Ctrl+C New Contact
 Shift+Ctrl+M New Message
 Shift+Ctrl+P New Password Entry

Switching Between modules:

Ctrl+0 EPIM Today
 Ctrl+1 Calendar
 Ctrl+2 To Do
 Ctrl+3 Notes
 Ctrl+4 Contacts
 Ctrl+5 Mail
 Ctrl+6 Passwords
 Ctrl+9 Trash

General:

Ctrl+L Hide/show private items
 Ctrl+Q Focus on search box
 Ctrl+Alt+F Advanced search
 Shift+Ctrl+A Attachments manager

Database operations:

Ctrl+N New Database
Ctrl+O Open Database
Ctrl+S Save changes or New Database
Ctrl+P Print

In Calendar:

Ctrl+D Day View
Ctrl+W Week View
Ctrl+M Month View
Ctrl+R Year View
Ctrl+E Table View
Ctrl+T Today
Ctrl+G Go to
Ctrl+H Hide/Show completed

In To Do:

Ctrl+T Tree View
Ctrl+D Consolidated View
Ctrl+E Plain View
Ctrl+H Hide/show completed
Ctrl+K Show in Calendar
Ctrl+R Add to Root
Ctrl+Alt+Right Move in
Ctrl+Alt+Left Move out
Ctrl+Alt+Up Move up
Ctrl+Alt+Down Move down
Ctrl+Alt+C Collapse All
Ctrl+Alt+X Expand All

In Notes:

Ctrl+R Add to root
Ins Add as Child
Ctrl+I Add as Sibling
Ctrl+Alt+Right Move in
Ctrl+Alt+Left Move out
Ctrl+Alt+Up Move up
Ctrl+Alt+Down Move down
Ctrl+Alt+C Collapse All
Ctrl+Alt+X Expand All

while creating a new Note
Ctrl+D insert current Day
Ctrl+T insert current Time

In Contacts:

Ctrl+G Add Group
Ctrl+H Hide/show groups

In Mail:

Ctrl+R Reply to Sender
Ctrl+Shift+R Reply to All
Ctrl+W Forward
Ctrl+M Send
Ctrl+Alt+A Send and Receive All
Ctrl+Alt+R Receive All
Ctrl+Alt+X Send All

In Passwords:

Ctrl+G Add Group
Ctrl+H Hide/Show Groups
Ctrl+Alt+U Copy User Name
Ctrl+Alt+P Copy Password

Synchronization

Ctrl+Alt+G Google
Ctrl+Alt+Y Yahoo
Ctrl+Alt+F myFUNAMBOL
Ctrl+Alt+O AOLSync
Ctrl+Alt+N GooSync
Ctrl+Alt+T Toodledo
Ctrl+Alt+M Memotoo
Ctrl+Alt+E Stylite/Egroupwere
Ctrl+Alt+H HighRiseHQ
Ctrl+Alt+D CalDav
Ctrl+Alt+L SyncML
Ctrl+Alt+W Windows Mobile
Ctrl+Alt+U Outlook

In text editing standard shortcuts are enabled: Ctrl+X, Ctrl+C, Ctrl+V, Ctrl+Y, Ctrl+A.

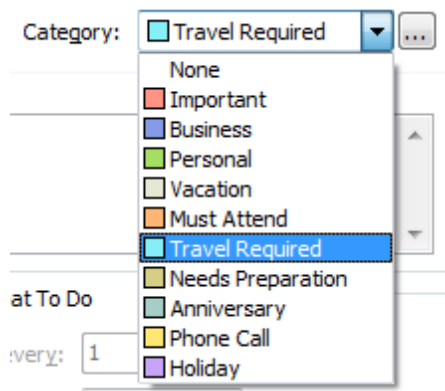
All shortcuts could be edited under **Tools -> Options -> Shortcuts** dialog.

4.16 Categories

Categories in EssentialPIM Pro are an easy way to sort or mark your entries.

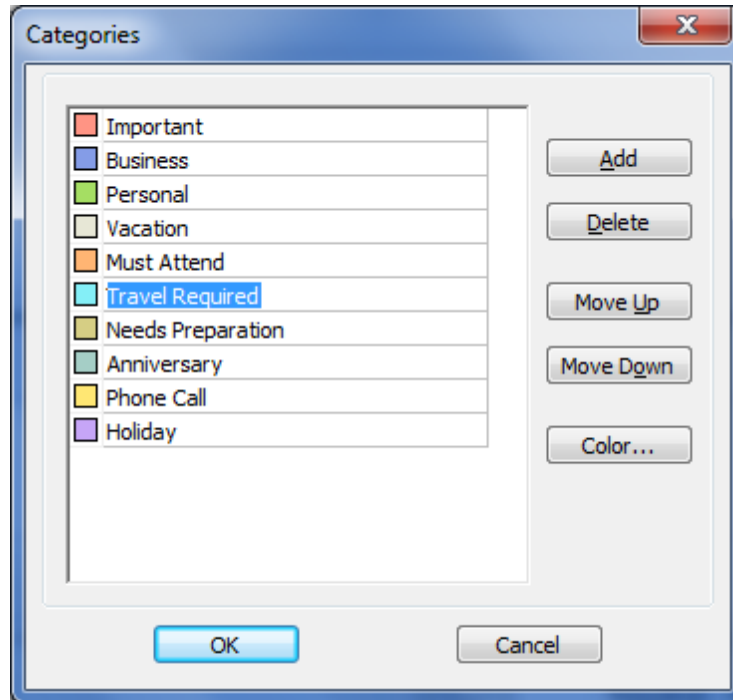
Using categories with Appointments and To Dos.

You can set category for Appointments or To Dos in special drop down menu in Appointment info or To Do info dialog



For more flexibility Categories list is customizable.

By pressing "..." button you get to Categories dialog where you can add, delete or edit categories.



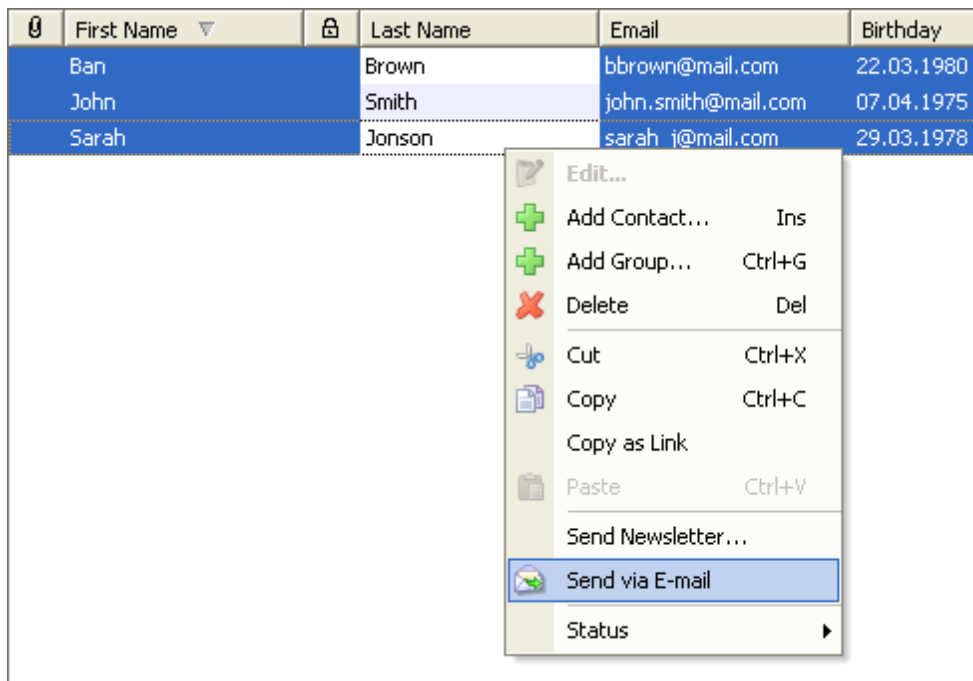
The order which categories are listed in this dialog is used while sorting To Dos or Appointments by category in table view. To change categories order you can use **Move Up** and **Move Down** buttons.

The color near category name is used to colorize the Appointments in Calendar or to mark To Do's. To change category color press **Color...** button and choose preferred one.

4.17 Send via e-mail

This feature will allow you to email item with data from EssentialPIM. Just right-click on

any Appointment, To Do, Contacts or Note and choose **Send via E-mail**:



This will create a message with all data from selected item(s). Message will be created with default email client in the system.

4.18 Printing

EssentialPIM Pro allows you to print out all your information in easy to read form. Print menu is accessible at **File -> Print**.

What you print will depend on in which view you are currently in: Calendar, Notes, or Contacts.

All data can be printed one-by one, or you can select multiple entries using CTRL + mouse (for contacts and Notes), or All entries can be printed.

To rotate the page, in the Print Preview Page, find "Page Setup", or press Alt+U and you will be able to change the Orientation of the page.

Printing EPIM Today

You can print EPIM Today - exactly as it looks on the screen.

Printing Calendar

There are several option of how to print Calendar: Day View, Week View and Month View. All are different options for representing your day schedule. You can also print several Days, Weeks and Months.

Printing To Dos

You can select which To Dos to print and which fields. If you want to select multiple To Dos, use CTRL+ Mouse, or Shift+ Keyboard arrows.

Printing Notes

You can select several, one or all notes to print out into. A tree of all notes is printed above all notes.

Printing Contacts

You can select which contacts to print out (using CTRL+ Mouse, or Shift+ Keyboard arrows), or print out all.

5 Information for translators

We welcome people to translate EssentialPIM's language file into their native languages. We used to provide translators with free EssentialPIM Pro licenses for their support.

Interface

Whole EssentialPIM's interface is contained in ENGLISH.LNG file, which is situated in EssentialPIM's installation directory. Please feel free to take the file and start translating. Usually it takes a couple of hours.

6 Buying EssentialPIM Pro

Trial version of EssentialPIM Pro is full featured, but works only for 30 days. Buying EssentialPIM Pro, you will get:

- EssentialPIM Pro version you purchased forever. In addition, you are entitled to free updates during one year since purchase date.
- Priority support via email
- Newsletter and tips for using EssentialPIM Pro

EssentialPIM Pro Desktop / Portable cost \$39.95(US).

Order EssentialPIM Pro

- [Order EssentialPIM Pro](#) (\$39.95)
- [Order EssentialPIM Pro Network Edition](#) (\$59.95)

You can buy using:

- Your credit card (all major cards are supported) via online secure form
- PayPal
- Purchase order
- Telephone or fax

For phone orders and order related questions, our Toll Free Number in the US is 1-877-353-7297. Internationally you can reach us at 1-(952) 646-5331.

Sales questions are welcome at epimsales@essentialpim.com.

6.1 Sales policy

Upgrades

By becoming a registered user you can use EssentialPIM Pro version you purchased forever. In addition, you are entitled to free updates during one year since purchase date.

Refunds

We have made our returns policy as simple as possible so that you will come back and shop with us again and again. We are so confident that you'll be satisfied with your software purchase, that we are offering a 30-day money-back guarantee.

If at any time during the first 30 days of using the software you have purchased, you find that the product is not or does not meet or live up to your needs feel free to contact us at epimsales@essentialpim.com and request a refund.

When requesting for refund, please provide the following information:

- Your full name
- Order ID number
- Date of purchase
- Brief reason for dissatisfaction

All refunds for credit will be issued to the credit card account that appears on the original order. All returns are subject to approval by our customer service department.

7 Support

Astonsoft Ltd. is committed to supporting its customers. Please feel free to browse through the below listed topics and find the most appropriate way to get your question/problem solved.

7.1 FAQ

7.1.1 General

Q: How to make EPIM to start with another module?

A: If you'll disable "Start with EPIM Today" in Tools -> Options -> EPIM Today than EPIM will start with the last used module.

Q: How to find my database file?

A: EPIM stores all data in .epim database files. The default paths for EPIM databases are:

C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP

C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista and Seven

If you can't find it anyway than try to search *.epim files on your computer.

Q: I've tried your Free version and then purchased Pro but all my data was lost

after installation. How to recover it?

A: EPIM stores all data in .epim database files. You only need to open (File -> Open) your old base in EPIM Pro version.

The default paths for EPIM Free databases are:

C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP

C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista and Seven

If you can't find it anyway than try to search *.epim files on your computer.

Q: I've downloaded your EPIM but the installer would not work. What should I do?

A: This is because of incomplete download. Try to redownload instalation file again. If it still tells that file is corrupted than most probably your browser or provider cached file and every time you try to re-download it gives you cashed incomplete file again. Try to clear browser cache or download with any download manager.

Q: Will my data preserve if I'll upgrade my EPIM Free to Pro?

A: Yes, but you'll need to open (File -> Open) your old base in Pro version manually.

The default paths for EPIM Free databases are:

C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP

C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista and Seven

If you can't find it anyway than try to search *.epim files on your computer.

Note, if you upgrading from Pro trial to paid version then no need to do something.

EPIM will pick up file automatically.

Q: Is it possible to run EPIM on Mac OS (Linux)?

A: Unfortunately no. Only Windows version available for now.

Q: I want to install EPIM to my smartphone. What version should I buy?

A: Regular EPIM Pro version runs on Windows desktop only and syncs with Windows Mobile, Android, iOS and Palm devices. Add synchronization under "File -> Add Synchronization". We also have Android version with To Do, Passwords and Notes module. It's available on Google Play

Q: How can I access .epim database directly?

A: EPIM uses Firebird database engine. You can access database directly using any Firebird database manager. For example: <http://www.mitec.cz/ibq.html> Please note that you should understand how to work with database, otherwise data will be lost. Default I

Q: My database size is 1,5Mb but backup file size is 350kb? Does backup stores all my data?

A: Don't worry all your data is stored in backup. It is compressed.

Q: I have bought other computer but now I want to transfer all my EPIM program and data to this new computer - can you explain to me how to do this?

A: You should install EPIM to a new computer and register it with your license name and key. Then you should transfer your database and open it in EPIM (File -> Open). You can always download EPIM installation file from our site: <http://www.essentialpim.com>

Q: How can I transfer data to EPIM from another PIM?

A: Data could be transferred via supported by EPIM formats only. You can find all

supported formats in File -> Import menus.

Q: How to sort records by...

A: All EPIM items could be sorted by any field. Click on field caption in order to sort by it. Holding Ctrl button will allow to sort by several fields.

Q: Is there a way to export in one file all EPIM settings?

A: Yes, all settings are stored in EPIM.ini file which is stored here: C:\Documents and Settings\User Name\Application Data\EssentialPIM - for XP C:\Users\User_name\AppData\Roaming\EssentialPIM - for Vista Portable version stores this file in its program

Q: I purchased the EssentialPIM Pro and I would like to know whether after one year, will I have to buy a new license?

A: You'll need to renew your license for 50% of its cost in order to receive further upgrades for additional year. If you won't want to sign up for further upgrades then you'll be able to use your current (for that moment) version for a lifetime.

Q: Can I install EPIM to my notebook and on my PC?

A: Yes, license agreement allows you to install EPIM on two computers belonging to you (desktop and notebook).

Q: How to change/remove database password?

A: Do the following to remove or change password: 1. Go to File -> Password protection 2. Enter your password and press OK 3. Press Clear or enter new password in appeared dialog

Q: EssentialPIM can not open database from a shared disk

A: EPIM Pro can't open database file over the network directly. It connects via Firebird server. Regular EPIM Pro version allows one user connection to database. Please refer to Networking topic for more details.

Q: Is it possible to host EPIM database online?

A: Yes, absolutely. You need "Firebird database hosting". Just one example: <http://www.techsol-host.com/firebird.php> You will be able to connect to your database from anywhere.

Q: I've forgotten my database password. How can I recover it?

A: Unfortunately it's not possible to recover database password.

Q: How to print Calendar in color?

A: You should enable corresponding option in Print options dialog (File -> Print). Note, this feature is available in Pro version only.

Q: After upgrade, will my data be preserved?

A: Yes, your data is stored in *.epim file and will be automatically converted to the new version format.

Q: How do I restore Backups?

A: Backups are just *.epim files, named "file name_backup_year_month_day_time". They can be opened from within EPIM using File -> Open menu.

Q: This morning I opened PIM and all my entries had disappeared. What do I do

now?

A: Please search your computer for *.epim files, most probably you have opened a wrong *.epim file or created a new one, empty.

Q: Do I need to purchase the extended download service?

A: No you do not. You will always have full access to the latest releases. If you lose your registered version by for example, reformatting your hard drive, you can always visit the Download section on the web site and get the latest release there free of charge. Once the program is downloaded, simply register it with your license details. In order to safely remove extended download service from the cart (upon purchasing) click on the corresponding checkbox and then click the "Update" button on the order form.

Q: Can I request a feature?

A: Yes, of course. We try to really attentively listen to the users- that's how EssentialPIM is being developed. Please post your request here: Online Support Forum - > Suggestions.

Q: Is EssentialPIM Pro translated to ... language?

A: For a current list of translations, please check here. If you do not see EssentialPIM translated to your language - please feel free to do it, it is really easy. Just visit the Translators' Page.

Q: Can I help make EssentialPIM Pro better?

A: Yes, you can translate EssentialPIM Pro into your native language or suggest a feature.

Q: In the database manager window is a function to check for invalid file links in the database, does this only apply to attachments or does it also check for invalid links in notes?

A: It applies to attachments only.

Q: EPIM became very slow. How to boost performance?

A: First, empty trash and run optimization under "File -> Database management". If it won't help then create a new database under "File -> New -> EPIM Data File" and save it. Then sync it with your file using EPIM Synchronizer tool which could be downloaded from our site - <http://www.essentialpim.com/?r=download> Then open newly synced file under "File -> Open"

Q: I have created a password, but how can I change my password?

A: You need to go to File -> Password protection, erase asterisks and enter your new password.

Q: Password protection or Optimization option is not active

A: EPIM can't utilize database management tools while mail send/receive processes are active. Disable "Check mail on start" option and restart EPIM. Password protection and Optimization options will be active then.

Q: How to delete/archive old records from database?

A: We have a special tool for this - EPIM Archiver/DupeRemover. It can delete or archive items older than particular date. Tool available from our download page - <http://www.essentialpim.com/?r=download>

7.1.2 Calendar

Q: How to add national holidays to calendar?

A: You can import holidays as iCal (.ics) calendar which could be downloaded from Internet. You could start searching from our iCal's download page: <http://www.essentialpim.com/?r=download&pr=ical>

Q: How to generate a list of upcoming birthdays and/or a list of all birthdays.

A: You should switch calendar to Table view, filter tasks according to Birthday (Holiday) category and set date ranges. You'll get your list then.

Q: Is there a possibility to make a text search, among all appointments scheduled in the current period?

A: Yes, switch to Table view, then you can make search by keywords then set date limits. Or use Advanced search.

7.1.3 Notes

Q: Internet links doesn't work in Notes. The link become blue when I enter it, but nothing happens when I Click on it.

A: It works the same as in MS Word. You should click links holding Ctrl button.

7.1.4 Contacts

Q: How can I delete unnecessary fields from contacts?

A: Open any contact, select the field you want to delete and press "Delete field" button.

Q: Is it possible to add additional anniversaries to contact i.e. wife's birthday or any other?

A: Yes, open any contact and press "Add field" button then set Date Field type. EPIM will create recurring task for this event the same as for birthdays then.

Q: How to add/remove columns to display in Contacts view?

A: Right-click columns caption and choose fields to display.

Q: How can I add/edit field(s) in contacts?

A: Open any contact and press "Add field" or select a field and press "Edit field" correspondingly.

Q: How can I change fields order in Contacts?

A: Just drag them in preferred order with left mouse button.

Q: Some fields are not listed in Contacts table (main view) and some are not necessary. How to set to display needed fields?

A: Right-click on field name caption and choose fields to display from context menu.

7.1.5 Mail

Q: "Socket Error # 10060 Connection timed out" error

A: Make sure that all servers setting were set correctly under "Tools -> Account Settings -> Edit -> Servers Settings"

If you are not sure about what to enter then login to your account via web interface and refer to Help area. Search for POP3/IMAP (for incoming mail) and SMTP (for outgoing mail) settings through FAQs.

Q: How to make mail available offline for IMAP accounts?

A: IMAP accounts download headers only by default. Press "Manage Folders" button from Actions panel and choose what folders to download fully. Those folders contents will be available offline then.

7.1.6 Network

Q: We've ordered additional Network license(s) but we can't access to database. It says that we need network license. What to do?

A: Send us all your order ID's we'll send you a proper key then.

Q: I am trying to log into the program, but it only lets me login with the SYSDBA. How can I login with another user name?

A: You should create user account(s) to login under another user. Here are the steps:
1. Login as SYSDBA. 2. Go to Tools -> Users. 3. Create an account(s) you need.

Q: Is there a manual or installation instructions for EssentialPIM Pro Network available?

A: Here goes the link to video tutorial about establishing network connection: <http://www.essentialpim.com/?r=support&pr=tutor> It should help you. If you'll encounter problems anyway let us know on which step you have problem. You can also refer to Networking topic of this manual.

Q: When I'm trying to open database I get this error message: "You need network license to connect to EPIM server"

A: You've exceeded amount of simultaneously connected users to database. Regular EPIM Pro version allows one user connection over the network. For more connections you'll need network licenses. The number of licenses should equal the number of user installations in your EssentialPIM Network. I.e. if you have 10 installations, you need to purchase 10 licenses. Note, only EPIM installations need license, server can run without EPIM installation.

Q: I've purchased Network license for each workstation, firebird is running on the server but when I'm trying to connect to database this message appear: "You need network license to connect to EPIM server"

A: Make sure that exceeding EPIM copy is not connected to database. Possible someone run EPIM client twice. Check hidden items in system trays on each workstation.

Q: I can not connect to my database over the Network.

A: Most probably firewall is to blame. Following ports need to be open to allow EPIM

Clients to communicate to the server:

- on Server machine for fbserver.exe:
 - incoming: 3050 and 3051
 - outgoing : whole range (fbserver uses random range of ports to communicate events)
- on Client machine for EssentialPIM.exe:
 - incoming: whole range
 - outgoing: 3050 and 3051

Q: EPIM is slow over the Network

A: If your Network is fine, please make sure that the database is not being copied by some backup applications (or Windows built-in tools) while Network users connect to it.

7.1.7 Potable version issues

Q: I want to upgrade my U3 version but can't find it on your download page?

A: Sorry, U3 version won't be supported anymore. You can install version for regular drives. Download the ZIP file and unzip it on your flash drive and run EssentialPIM.exe. Launchpad icon could be added with this tool - <http://www.softpedia.com/reviews/windows/Shortcut-Creator-4U3--Review-76269.shtml>

Q: My EPIM is very slow on my USB stick. How can I boost it up?

A: EPIM speed depends on your USB stick speed. Try to empty Trash and delete old unnecessary items. You can also try to Optimize database (File -> Database management -> Optimize). These measures should boost performance. Try also to reformat USB drive.

Q: Can I use portable EPIM as desktop EPIM?

A: This is not recommended, although you can try. Just unzip non-U3 version to your hard drive and run EssentialPIM.exe from program folder.

Q: "Cannot write key information" error when trying to enter key?

A: This happens on some portable versions when user wants to apply new license key. Prior to applying new code, exit EPIM, erase "EssentialPIM.ini" file which is in EPIM installation directory. Start EPIM. It will accept key.

Q: EPIM asks for my license code each time I open the program from a different computer. How to prevent this?

A: It is because you've installed Desktop version instead of Portable one. Download correct version from our web site please - <http://www.essentialpim.com/index.php?r=download>

7.1.8 Synchronization issues

Q: Is it possible to sync Desktop and Portable calendar?

A: Yes, we have a special EPIM Synchronizer tool for this. Find more details here:
<http://www.essentialpim.com/?r=products&pr=epimsync>

Q: How can I sync only specified items?

A: You can use "private" flag for this. EPIM can include/exclude private items to/from synchronization. You can exclude private items from synchronization by unchecking corresponding option in Tools -> Options -> General dialog. "Private" flag can be set via context menu for any item.

Q: Why Outlook synchronization syncs everything except mail?

A: EPIM doesn't sync mail with Outlook. Mail sync directly with mail server if you use IMAP account. Create IMAP accounts in both EPIM and Outlook and your mail will be always synced.

Q: I've got duplicates after synchronization/import. How to remove them?

A: We have a special tool for this - EPIM Archiver/DupeRemover. It's available from our download page - <http://www.essentialpim.com/?r=download>

7.1.9 Ordering and upgrade problems

Q: How can I get an invoice for my order?

A: You can always get an invoice here: https://www.regnow.com/order_lookup.html

Q: Still not received my CD, has it been shipped?

A: Receiving a CD might take some time - up to a month, please be patient. In case you do not get it after a month, please contact us.

Q: I've ordered EssentialPIM recently but didn't received my license key.

A: The key is sent automatically upon funds receipt. It means that if you paid by card you should receive your license within minutes. For some products, automatic message is sent, saying that the key will be sent within 2 working days. In case you do not get it after few days, please contact us.

Q: "Cannot write key information" error when trying to enter key?

A: This happens on some portable versions when user wants to apply new license key. Prior to applying new code, exit EPIM, erase "EssentialPIM.ini" file which is in EPIM installation directory. Start EPIM. It will accept key.

Q: What's your upgrade policy for EssentialPIM Pro?

A: By becoming a registered user you can use EssentialPIM Pro version you purchased forever. In addition, you are entitled to free updates for one year starting from your purchase date.

Q: License expired after upgrade. Why?

A: According to our upgrade policy regular licence allows to upgrade for one year after purchase date. If you got this message then it means your free upgrades period has over. Now you need to order an upgrade (it costs 50% of full license price) - <http://www.essentialpim.com/?r=buy>. Or you can back to previous version - http://www.essentialpim.com/ky/index.php?_m=downloads&_a=view. If you are not sure what

version you entitled for then forward your order ID or email used for ordering to support.

7.2 Update

EssentialPIM Pro automatically checks for updates once a week. If an updated version is found, you'll be notified. To check for updates manually, click on **Help -> Check For New Version**.

Note, you can always download the latest version of the program from our Web site - www.essentialpim.com

7.3 Troubleshooting

If you experience any problem with EssentialPIM Pro, please follow these steps to find a solution:

- Make sure that you have installed the latest version
- Visit our online support community forum at www.essentialpim.com/forum
- If you still have not found the answer, do not hesitate to contact us at epimsupport@essentialpim.com

8 Contact

Please do not hesitate to contact us:

By e-mail

For general information please e-mail us at epiminfo@essentialpim.com

For sales information please e-mail us at epimsales@essentialpim.com

For technical support please e-mail us at epimsupport@essentialpim.com

By fax/phone *(Please note, we do not provide support over the phone)*

Fax: (+372) 650-79-77

Phone: (+372) 51-927-921

By post

Astonsoft Ltd.

Laki 9A

Tallinn 10621

Estonia